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Fashion Accessories (Men's and Women's)

FACT FILE

**Market Research Division
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**Fashion Accessories
(Men's and Women's)**

FAIRCHILD FACT FILE

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E.B. Gold, Manager
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FASHION ACCESSORIES

Market Trends

The U.S. consumer is facing cutbacks in his/her discretionary spending due to inflation, taxes and economic conditions and this is detrimental to sales of fashion accessories. In past years, accessories such as small leather goods and belts were often thought of as "impulse" items which consumers bought on a whim. However, the consumer is now more careful with his dollars because it is needed elsewhere.

Accessory manufacturers have tried, with moderate success, to combat this buying resistance through the introduction of new colors and fabrics from which to choose. In addition, many consumers would rather purchase a less expensive accessory item to enliven their present wardrobe than buy a new one at the present time. Many consumers are willing to buy quality accessories which may cost a little more but will last a long time. For these reasons, sales of accessories have held up better than many apparel items. According to NPD Research, men's accessory sales, in the 12 month period ending November 1980, were 3.2% higher than in the previous 12 months.

Fashion accessories for both men and women consist of a wide variety of products, both decorative and utilitarian, including such diverse items as gloves, handbags, precious and costume jewelry, scarfs, sunglasses and umbrellas.

Accessories cannot be defined in a single standard industry classification whose value or size is readily measured. An evaluation is further complicated by the fact that some accessories, notably belts and trimmings such as buckles and the like, are sold either to other apparel manufacturers who use them as accessories for the articles they produce, or they are sold directly to the retail customer through normal retail channels.

The distinction between items included in the men's furnishings category and in fashion accessories is also subject to varying interpretations, further complicating the problem of evaluating the size of the market. For the purpose of the FACT FILE reports, it should be noted that information on men's neckwear, hats and underwear is covered in detail in the Men's Furnishings & Work Wear Fact File and information on men's and women's hosiery is detailed in the Bodywear, Legwear/Hosiery Fact File.

At the Manufacturer Level

GENERAL STATISTICS ON THE INDUSTRY

The 1977 Census of Manufactures provides the latest detailed information on manufacturers classified in the accessories component industries. This is the first complete census conducted since 1972.

Value of shipments of these selected accessories industries was a combined \$6.9 billion, with the jewelry industry (both precious metal and costume) accounting for \$2.9 billion. The total value at the wholesale (or factory) level is considerably higher due to the vast amount of imports, which are an important factor in almost every category within the accessories classification.

GENERAL STATISTICS ON THE INDUSTRY

	Costume Jewelry (SIC 3691*)			Jewelry, Precious Metal (SIC 3911*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	837	764	+ 9.5%	2,165	1,497	+ 44.6%
Number of establishments**	847	766	+ 10.6	2,206	1,524	+ 44.7
Number with 20 or more employees	236	208	+ 13.5	405	315	+ 28.6
Employees, total (thous.)	25.0	21.4	+ 16.8	42.1	32.6	+ 29.1
Production workers (thous.)	20.8	17.6	+ 18.2	29.2	23.8	+ 22.7
Payroll (mil. \$)	215.9	132.1	+ 63.4	432.0	267.2	+ 61.7
Value added by manufacture# (mil. \$)	485.1	275.7	+ 75.9	979.8	536.0	+ 82.8
Value of shipments## (mil. \$)	816.6	471.6	+ 73.1	2,107.0	1,124.6	+ 87.3
Capital expenditures, new (mil. \$)	17.6	6.7	+162.7	25.6	10.3	+148.5

	Watches, Clocks (SIC 3873*)			Apparel Belts (SIC 2387*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	283	184	+ 53.8%	281	292	- 3.8%
Number of establishments**	302	202	+ 49.5	284	297	- 4.4
Number with 20 or more employees	112	99	+ 13.1	119	132	- 9.8
Employees, total (thous.)	31.5	30.8	+ 2.3	9.4	10.3	- 8.7
Production workers (thous.)	24.0	24.7	- 2.8	7.3	8.7	- 16.1
Payroll (mil. \$)	316.6	230.3	+ 37.5	76.1	65.9	+ 15.5
Value added by manufacture# (mil. \$)	684.5	466.0	+ 46.9	150.3	132.5	+ 13.4
Value of shipments## (mil. \$)	1,594.7	937.2	+ 70.1	286.9	257.5	+ 11.4
Capital expenditures, new (mil. \$)	23.2	18.8	+ 23.4	2.5	3.2	- 21.9

	Fabric Dress & Work Gloves (SIC 2381*)			Leather Gloves (SIC 3151*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	100	106	- 5.7%	84	95	- 11.6%
Number of establishments**	132	137	- 3.6	101	106	- 4.7
Number with 20 or more employees	92	94	- 2.1	66	60	+ 10.0
Employees, total (thous.)	10.9	11.9	- 8.4	5.5	4.9	+ 12.2
Production workers (thous.)	9.9	10.9	- 9.2	4.7	4.3	+ 9.3
Payroll (mil. \$)	69.0	56.3	+ 22.5	33.9	22.1	+ 53.4
Value added by manufacture# (mil. \$)	160.9	100.3	+ 60.4	67.6	43.0	+ 57.2
Value of shipments## (mil. \$)	312.4	198.8	+ 57.1	178.0	98.2	+ 81.3
Capital expenditures, new (mil. \$)	3.5	1.9	+ 84.2	1.9	0.5	+280.0

(continued)

GENERAL STATISTICS ON THE INDUSTRY

	Women's Handbags (SIC 2171*)			Small Leather Items (SIC 3172*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	404	431	- 6.3%	253	238	+ 6.3%
Number of establishments**	418	444	- 5.8	260	244	+ 6.5
Number with 20 or more employees	186	214	- 13.1	97	98	- 1.0
Employees, total (thous.)	20.3	22.2	- 8.5	11.9	11.5	+ 3.5
Production workers (thous.)	18.2	19.8	- 8.1	9.6	9.3	+ 3.2
Payroll (mil. \$)	144.0	121.7	+ 18.3	98.2	73.4	+ 33.8
Value added by manufacture# (mil. \$)	266.5	201.5	+ 32.2	205.8	143.7	+ 43.2
Value of shipments## (mil. \$)	505.2	365.0	+ 38.4	366.8	242.2	+ 51.4
Capital expenditures, new (mil. \$)	6.6	3.7	+ 78.4	4.8	2.8	+ 71.4

	Luggage (SIC 3161*)			Millinery (SIC 2351*)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Number of companies	286	266	+ 7.5%	151	215	- 29.8%
Number of establishments**	298	277	+ 7.6	151	216	- 30.1
Number with 20 or more employees	130	130	--	47	52	- 9.6
Employees, total (thous.)	19.2	17.1	+ 12.3	2.7	3.2	- 15.6
Production workers (thous.)	15.8	14.3	+ 10.5	2.2	2.7	- 18.5
Payroll (mil. \$)	164.1	106.8	+ 53.6	20.2	17.0	+ 18.8
Value added by manufacture# (mil. \$)	328.3	194.1	+ 69.1	32.8	33.2	- 1.2
Value of shipments## (mil. \$)	654.9	364.5	+ 79.7	75.1	58.1	+ 29.2
Capital expenditures, new (mil. \$)	8.1	8.9	- 9.0	0.2	0.3	- 33.3

nr = not reported

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made as shown below:

SIC 3961 covers manufacturers specializing in the production of costume jewelry, costume novelties and ornaments made of all materials except precious metal, etc.

SIC 3211 covers manufacturers specializing in the production of jewelry and other articles worn on or carried about the person, made of precious metals with or without stones, including cigarette cases and lighters, vanity cases and compacts; trimmings for umbrellas and canes; and jewel settings and mountings.

SIC 3873 covers manufacturers specializing in the production of clocks, watches, watchcases, mechanisms for clockwork-operated devices and clock and watch parts, as well as establishments primarily engaged in assembling clocks and watches from purchased movements and cases.

SIC 2387 covers manufacturers specializing in the production of men's and women's apparel belts, regardless of material.

(continued)

GENERAL STATISTICS ON THE INDUSTRY

SIC 2381 covers manufacturers specializing in the production of dress, semi-dress, and work gloves and mittens, cut and sewn from purchased woven or knit fabric, or these fabrics combined with leather or plastic.

SIC 3151 covers manufacturers specializing in the production of dress, semi-dress, and work gloves exclusively of leather or leather with lining of other material.

SIC 3171 covers manufacturers specializing in the production of women's handbags and purses of leather or other materials, except precious metals.

SIC 3172 covers manufacturers specializing in the production of small articles, such as billfolds, key cases, and coin purses of leather or other materials, except precious metals.

SIC 3161 covers manufacturers specializing in the production of luggage of leather or other material.

SIC 2351 covers manufacturers specializing in the production of women's, misses', children's and infants' millinery.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). Available data on the total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) are covered in the value of shipments for the latest year available compared with other years, as shown on page 14.

Source: U.S. Bureau of the Census, Census of Manufactures, 1972, 1977.

Employment & Earnings

According to the latest employment and earnings report issued by the U.S. Department of Labor, all of the accessories industries measured by the Department declined in employment numbers in 1980 as compared to 1979. The number of employees in the luggage industry fell the most, 17.0%. However, average weekly earnings of production workers in the five accessories industries covered rose during this same period.

GENERAL STATISTICS ON THE INDUSTRY

Employment & Earnings

Total Employment and Earnings of Production Workers In Specified Accessories Manufactures

	Annual Averages			% Change 1980/1979
	1980(p)	1979	1978	
<u>Costume jewelry (SIC 3961*)</u>				
All employees (thous.)	27.9	32.1	34.6	- 13.1%
Production workers (thous.)	21.9	25.9	28.3	- 15.4
Avg. weekly earnings	\$166.30	\$150.10	\$140.21	+ 10.8
<u>Jewelry & precious metals (SIC 3911*)</u>				
All employees (thous.)	36.5	39.8	42.2	- 8.3%
Production workers (thous.)	25.7	28.5	30.4	- 9.8
Avg. weekly earnings	\$213.78	\$189.58	\$179.65	+ 12.8
<u>Women's handbags & personal leather goods (SIC 317*)</u>				
All employees (thous.)	30.8	33.2	32.4	- 7.2%
Production workers (thous.)	26.3	28.4	27.2	- 7.4
Avg. weekly earnings	\$154.85	\$148.34	\$136.52	+ 4.4
<u>Watches, clocks & watchcases (SIC 387*)</u>				
All employees (thous.)	22.8	28.1	30.0	- 18.9%
Production workers (thous.)	17.0	21.6	23.1	- 21.3
Avg. weekly earnings	\$202.67	\$184.30	\$174.05	+ 10.0
<u>Luggage (SIC 3161*)</u>				
All employees (thous.)	14.6	17.6	17.3	- 17.0%
Production workers (thous.)	11.0	13.7	13.3	- 19.7
Avg. weekly earnings	\$177.98	\$159.56	\$151.48	+ 11.5

*For a definition of these SIC numbers, see pages 3 and 4.

(p) = preliminary

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings.

Employment Size

In all the accessories industries shown in the table below, over half of all manufacturing plants employed less than 50 persons in 1977. The fabric dress and work glove industry had the lowest percentage of manufacturing establishments with employment under 50 persons (53.8%) while the costume jewelry industry had 92.8% of its' plants in this employment category.

Large plants with 50 persons or more held the dominant share of value of shipments in these industries. The share of shipment value coming from large plants ranged from a low of 62.6% (precious metal jewelry industry) to a high of 93.8% (watches and clocks industry).

GENERAL STATISTICS ON THE INDUSTRY

Employment Size

Manufacturing Establishments in Specified Accessories Manufactures
By Employment Class Size, 1977

	Establishments		Employees		Value of Shipments	
	No.	% of Total	No. (Thous.)	% of Total	Mil. \$	% of Total
Jewelry, precious metals (SIC 3911*), total	2,206	100.0%	42.1	100.0%	\$2,107.0	100.0%
By Establishment Size:						
Under 10 employees	1,526	69.2	4.0	9.5	1,409.3	10.1
10-49 employees	520	23.6	11.2	26.6	574.9	27.3
50-249 employees	140	6.3	15.0	35.6	748.0	35.5
250 employees or more	20	0.9	12.0	28.5	571.7	27.1
Costume jewelry (SIC 3961*), total	847	100.0	25.0	100.0	816.6	100.0
By Establishment Size:						
Under 10 employees	498	58.8	1.4	5.6	54.8	6.7
10-49 employees	246	29.0	5.5	22.0	175.0	21.4
50-249 employees	82	9.7	8.6	34.4	228.6	28.0
250 employees or more	21	2.5	9.5	38.0	358.3	43.9
Watches & clocks (SIC 3873*), total	303	100.0	31.6	100.0	1,597.8	100.0
By Establishment Size:						
Under 10 employees	150	49.5	0.4	1.3	16.4	1.0
10-49 employees	78	25.7	1.8	5.7	81.7	5.1
50-249 employees	44	14.5	5.0	15.8	206.6	12.9
250 employees or more	31	10.2	24.6	77.8	1,293.1	80.9
Apparel belts (SIC 2387*), total	284	100.0	9.4	100.0	286.9	100.0
By Establishment Size:						
Under 10 employees	120	42.3	0.5	5.3	13.9	4.8
10-49 employees	111	39.1	2.6	27.4	75.4	26.3
50-99 employees	35	12.3	2.5	26.3	64.5	22.5
100 employees or more	17	6.0	3.9	41.0	133.1	46.4
Fabric dress & work gloves (SIC 2381*), total	132	100.0	10.9	100.0	312.4	100.0
By Establishment Size:						
Under 10 employees	29	22.0	0.1	0.9	3.0	1.0
10-49 employees	42	31.8	1.3	11.9	31.3	10.0
50-249 employees	51	38.6	5.6	51.4	139.7	44.7
250 or more	10	7.6	3.9	35.8	138.4	44.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Employment Size

Manufacturing Establishments in Specified Accessories Manufactures
By Employment Class Size, 1977
 (continued)

	<u>Establishments</u>		<u>Employees</u>		<u>Value of Shipments</u>	
	<u>No.</u>	<u>% of Total</u>	<u>No. (Thous.)</u>	<u>% of Total</u>	<u>Mil. \$</u>	<u>% of Total</u>
Leather gloves & mittens (SIC 3151*), total	101	100.0%	5.5	100.0%	\$ 178.0	100.0%
By Establishment Size:						
Under 10 employees	21	20.8	(D)	--	3.0	1.7
10-49 employees	38	37.6	1.0	18.2	19.0	10.7
50-99 employees	24	23.8	1.7	30.9	69.8	39.2
100 employees or more	18	17.8	2.8	50.9	86.2	48.4
Women's handbags & purses (SIC 3171*), total	418	100.0	20.3	100.0	505.2	100.0
By Establishment Size:						
Under 10 employees	174	41.6	0.5	2.5	15.6	3.1
10-49 employees	141	33.7	3.4	16.7	87.2	17.3
50-249 employees	85	20.3	9.0	44.3	255.9	50.7
250 employees or more	18	4.3	7.4	36.5	146.6	29.0
Small personal leather goods (SIC 3172*), total	260	100.0	11.9	100.0	366.8	100.0
By Establishment Size:						
Under 10 employees	135	51.9	0.3	2.5	9.8	2.7
10-49 employees	67	25.8	1.6	13.6	43.4	11.8
50-249 employees	49	18.8	4.9	41.5	152.6	41.6
250 employees or more	9	3.5	5.0	42.4	161.1	43.9
Millinery (SIC 2351*), total	151	100.0	2.7	100.0	75.1	100.0
By Establishment Size:						
Under 10 employees	76	50.3	0.2	7.7	11.3	15.0
10-49 employees	64	42.4	1.5	57.7	42.8	57.0
50 employees or more	11	7.3	0.9	34.6	21.0	28.0
Luggage (SIC 3161*), total	298	100.0	19.2	100.0	654.9	100.0
By Establishment Size:						
Under 10 employees	125	41.9	0.5	2.6	15.0	2.3
10-49 employees	89	29.9	2.0	10.4	53.8	8.2
50-249 employees	68	22.8	7.1	37.0	234.4	35.8
250 or more employees	16	5.4	9.8	51.0	351.7	53.7

(D) = Less than 0.1 thousand.

* For a definition of these SIC codes, see pages 3 and 4.

Source: U.S. Bureau of the Census,
 Census of Manufactures, 1977,
Industry Series.

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

New York State was the leading manufacturing state in nine of the ten accessories industries covered. In the costume jewelry industry, Rhode Island was the leading state, with 37% of the manufacturing establishments and 52.5% of the shipment value in this industry.

Leading States in Specified Accessories Manufactures, 1977

	No. of Establishments		Employees (Thous.)	Value of Shipments (Mil. \$)
	Total	With 20+ Employees		
Millinery (SIC 2351*)				
United States, total	151	47	2.7	\$ 75.1
Leading states:				
New York	95	26	1.4	46.0
New Jersey	3	2	(D)	(D)
Costume jewelry (SIC 3961*)				
United States, total	847	236	25.0	816.6
Leading states:				
Rhode Island	315	119	13.1	428.4
New York	207	52	3.6	115.2
California	86	18	1.4	36.9
Massachusetts	49	17	3.1	114.0
New Jersey	18	8	0.7	19.7
Illinois	13	2	(D)	(D)
Connecticut	12	5	1.9	65.9
Colorado	11	3	0.2	2.1
Pennsylvania	10	3	0.3	7.0
Jewelry & precious metals (SIC 3911*)				
United States, total	2,206	405	42.1	2,107.0
Leading states:				
New York	759	171	12.9	893.2
Rhode Island	295	69	9.9	370.2
California	254	25	2.4	122.6
New Mexico	114	9	1.3	38.8
Massachusetts	76	25	4.1	162.4
Florida	72	8	0.8	39.0
New Jersey	66	20	2.0	114.5
Pennsylvania	64	7	0.5	26.8
Texas	58	12	1.9	83.4
Illinois	47	7	0.7	35.7
Arizona	44	4	(D)	(D)
Ohio	36	6	0.5	21.6
Washington	35	8	0.5	16.5
Colorado	34	6	0.3	9.1
Michigan	34	4	0.3	16.5
Indiana	16	5	0.8	41.3

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the IndustryLeading States in Specified Accessories Manufactures, 1977
(continued)

	<u>No. of Establishments</u>		<u>Employees</u> (Thous.)	<u>Value of Shipments</u> (Mil. \$)
	<u>Total</u>	<u>With 20+ Employees</u>		
Watches, clocks & watchcases (SIC 3873*)				
United States, total	303	113	31.6	\$1,597.8
Leading states:				
New York	71	30	4.8	255.6
California	52	7	0.7	36.2
New Jersey	21	10	0.9	34.5
Illinois	18	7	3.5	139.4
Michigan	16	8	1.3	70.3
Pennsylvania	12	8	1.1	43.6
Women's handbags & purses (SIC 3171*)				
United States, total	418	186	20.3	505.2
Leading states:				
New York	195	100	8.4	254.7
California	53	17	1.7	38.7
Florida	23	9	(D)	(D)
New Jersey	21	12	2.9	61.0
Texas	17	7	0.7	16.1
Massachusetts	15	6	0.6	12.9
Personal leather goods (SIC 3172*)				
United States, total	260	97	11.9	366.8
Leading states:				
New York	79	39	3.1	95.6
California	34	4	0.5	11.7
Massachusetts	23	8	1.8	49.8
Illinois	14	6	(D)	(D)
New Jersey	13	8	0.7	26.5
Rhode Island	12	10	(D)	(D)
Leather gloves & mittens (SIC 3151*)				
United States, total	101	66	5.5	178.0
Leading states:				
New York	30	16	1.4	50.8
Wisconsin	18	13	0.8	20.6
Illinois	9	7	0.7	14.9
Texas	4	4	0.4	12.8

(continued)

GENERAL STATISTICS ON THE INDUSTRY

Location of the Industry

Leading States in Specified Accessories Manufactures, 1977 (continued)

	<u>No. of Establishments</u>		<u>Employees</u> (Thous.)	<u>Value of Shipments</u> (Mil. \$)
	<u>Total</u>	<u>With 20+ Employees</u>		
Fabric dress & work gloves (SIC 2381*)				
United States, total	132	92	10.9	\$ 312.4
Leading states:				
New York	21	7	0.3	12.3
North Carolina	14	13	2.4	59.2
Mississippi	11	10	(D)	(D)
Ohio	9	6	(D)	(D)
Georgia	8	7	0.5	18.3
Missouri	6	6	0.6	27.8
Pennsylvania	6	4	0.4	9.1
Alabama	3	3	0.9	21.7
Belts (SIC 2387*)				
United States, total	284	119	9.4	286.9
Leading states:				
New York	142	55	3.2	95.0
California	42	9	0.7	21.2
Texas	15	13	1.3	29.6
Pennsylvania	12	6	0.5	14.0
Massachusetts	11	7	0.6	16.5
Connecticut	7	4	0.7	32.3
Luggage (SIC 3161*)				
United States, total	298	130	19.2	654.9
Leading states:				
New York	75	39	3.9	114.9
California	36	12	1.1	37.7
Illinois	28	7	0.5	15.4
New Jersey	20	13	1.7	51.1
Pennsylvania	13	7	0.9	32.5
Tennessee	9	5	1.6	44.3

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual firms.

* For a definition of these SIC numbers, see pages 3 and 4.

Source: Based on U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRODUCTION

Materials Consumed in Production

The 1977 Census of Manufactures contains the most complete information available on materials consumed in the manufacture of specified accessories, as noted below.

Materials Consumed in the Production of Specified Accessories, 1977

	Delivered Cost (Million \$)
JEWELRY, PRECIOUS METALS (SIC 3911*)	
Materials, parts, containers and supplies	\$1,041.6
Precious metals, all forms	390.1
Precious, semiprecious and synthetic stones & pearls	222.4
Jewelers' findings, including joints, pins, clasps, chains, etc.	78.9
Paper and paperboard products, including shipping containers, etc.	15.7
Other materials and components, parts, containers and supplies (incl. n.s.k.)	334.5
WATCHES, CLOCKS AND WATCHCASES (SIC 3873*)	
Materials, parts, containers and supplies	803.6
Fractional horsepower electric motors	4.2**
Watchcases of precious metals	25.1**
Watchcases of all other metals, including plastic	27.8**
Watch movements and modules, integrated circuits, diodes, etc., & watch parts (incl. dials, hands, displays, etc.)	365.0
Plastic resins and fabricated plastic products, except gaskets	23.3
Other materials and components, parts, containers and supplies (incl. n.s.k.)	358.2
FABRIC DRESS AND WORK GLOVES (SIC 2381*)	
Materials, parts, containers, and supplies	131.8
Broad woven fabrics	48.3
Purchased knitted fabric, including transfers from other plants of same company	27.9
Finished leather	13.9
All other materials and components, parts, containers and supplies (incl. n.s.k.)	41.7
LEATHER GLOVES AND MITTENS (SIC 3151*)	
Materials, containers, and supplies	68.5
Finished leather	46.8
Broad woven fabrics	4.1
Purchased knitted fabrics	4.1
All other materials and components, parts, containers, and supplies (incl. n.s.k.)	13.5

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Accessories, 1977 (continued)

	Delivered Cost (Million \$)
APPAREL BELTS (SIC 2387*)	
Materials, containers, and supplies	\$ 122.7
Broad woven fabrics	4.3
Purchased knitted fabrics, including transfers from other plants of same company	1.7
Finished leather	60.8
All other materials and components, parts, containers, and supplies (incl. n.s.k.)	55.9
WOMEN'S HANDBAGS AND PURSES (SIC 3171*)	
Materials, parts, containers, and supplies	184.0
Broad woven fabrics (piece goods)	12.1
Coated, impregnated, or laminated plastics on cloth backing, including artificial leather	23.1
Paper and paperboard products, except shipping and packaging materials	1.1
Plastic resins and plastic products	23.0
Finished leather	34.0
Trunk and luggage hardware, including locks	2.1
Other materials and components, parts, containers, and supplies (incl. n.s.k.)	88.6
PERSONAL LEATHER GOODS (SIC 3172*)	
Materials, parts, containers, and supplies	140.4
Broad woven fabrics (piece goods)	6.2
Coated, impregnated, or laminated plastics on cloth backing, incl. artificial leather	7.0
Paper and paperboard products, except shipping and packaging materials	2.6
Plastic resins and plastic products	15.4
Finished leather	34.6
Trunk and luggage hardware, including locks	1.6
All other materials and components, parts, containers, and supplies (incl. n.s.k.)	73.0

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed in the Production of Specified Accessories, 1977
(continued)

	<u>Delivered Cost</u> <u>(Million \$)</u>
LUGGAGE (SIC 3161*)	
Materials, containers, and supplies	\$ 271.4
Broad woven fabrics (piece goods)	15.5
Coated, impregnated, or laminated plastics on cloth backing, including artificial leather	51.3
Paper and paperboard products, except shipping and packaging materials	7.0
Plastic resins and plastic products	21.3
Finished leather	7.7
Trunk and luggage hardware, including locks	34.0
Other materials and components, parts, containers, and supplies (incl. n.s.k.)	134.6

n.s.k. - not specified by kind.

* For definition of SIC numbers, see pages 3 and 4.

** Represents the value of materials purchased.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

SHIPMENTS

Summary of
Value of Shipments by All U.S. Producers of Specified Accessories, 1972, 1977

	Value of Shipments (Million \$)		% Change 1977/1972
	1977	1972	
Specified accessories, total	\$5,445.5	nr	--
Jewelry, precious metal & costume jewelry	2,689.2	1,423.5	+88.9
Precious metal	1,907.7	981.8	+94.3
Platinum or karat gold	1,250.5	656.7	+90.4
Other precious metals	353.0	178.5	+97.7
Jewelry, n.s.k.	303.1	146.6	+106.7
Costume jewelry	781.5	441.7	+76.9
Watches	772.0	477.5	+61.7
Watches with imported movements or modules	300.7	192.1	+56.5
Watches with domestic movements or modules, clock cases and parts	471.3	285.4	+65.1
Apparel belts*	244.3	234.1	+ 4.4
Women's & children's	71.4	69.5	+ 2.7
Men's & boys'	132.7	126.0	+ 5.3
Other, n.s.k.	40.2	38.6	+ 4.1
Dress & semi-dress gloves & mittens	56.3	**	--
Leather	29.3	**	--
Fabric	18.2	**	--
Leather & fabric combination	8.8	**	--
Small personal leather goods	369.2	231.8	+59.3
Handbags & purses	436.2	344.4	+26.6
Millinery	74.2	58.7	+26.4
Luggage	585.3	321.9	+81.9
Other accessories	222.8	nr	--
Cotton handkerchiefs	27.0	28.0	- 3.6
Umbrellas, parasols & canes	36.0	37.8	- 4.8
Sun or glare glasses & sunglasses, ready-made	130.8	93.9	+39.3
Women's, misses' & juniors' scarfs, dickies & neckwear	29.0	nr	--

*Excludes belts made and sold as part of garments.

**Due to a change in reporting methodology, 1972 data on gloves & mittens is not comparable to 1977 data.

nr = not reported.

n.s.k. = not specified by kind.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series; Current Industrial Reports
MA-23D(79)-1.

SHIPMENTS

Jewelry

The value of U.S. manufacturers' shipments of precious metal and costume jewelry is expected to exceed \$3.7 billion in 1981, according to the 1981 U.S. Industrial Outlook. This represents a 5.1% increase over the estimated 1980 shipment value of \$3.5 billion. Shipment value of costume jewelry in 1981 is anticipated to be \$975 million, a 6% rise from an estimated \$920 million in 1980. The rise in the shipment value of precious metal jewelry, 4.8%, will increase shipments to \$2.75 billion in 1981 compared to \$2.6 billion the previous year.

Value of Shipments by All U.S. Producers of Precious Metal & Costume Jewelry:
Trends & Projections, 1978 - 1981
(Millions of \$)

	1981 Forecast	1980 Estimate	1979 Estimate	1978	% Change	
					1981/ 1980	1981/ 1978
Value of product shipments	\$3,725	\$3,545	\$3,365	\$3,072	+ 5.1%	+21.3%
Precious metal jewelry	2,750	2,625	2,500	2,257	+ 4.8	+21.8
Costume jewelry	975	920	865	815	+ 6.0	+19.6

Source: U.S. Department of Commerce,
Industry & Trade Administration,
1981 U.S. Industrial Outlook.

Total value of precious metal and costume jewelry imports in 1980 was an estimated \$755 million, down 18.7% from the 1979 jewelry import value of \$929 million. While the import value of costume jewelry actually rose slightly during this period, the value of precious metal jewelry imported declined to \$600 million from \$780 million in 1979, a loss of 23.1%. This drop was attributed to weakened demand for jewelry in the U.S. as gold prices soared. Imports of precious metal jewelry represented 20.2% of domestic consumption in 1980.

However, the export value of jewelry climbed 84.4% in 1980 and reached an estimated \$330 million compared to \$179 million in 1979, according to the Outlook. The export value of precious metal jewelry more than doubled to \$260 million and costume jewelry rose 29.6% to \$70 million.

The 1977 Census of Manufactures contains the latest detailed information on shipments of jewelry by type. According to this source, precious metal jewelry rose 94.3% in shipment value between 1977 and 1972. Costume jewelry rose 76.9% in shipment value over the same period.

The census report also covers the shipment value of watches. During the period between 1977 and 1972, the value of watches shipped by U.S. producers increased 61.7%. Detailed information on the value of shipments of precious metal jewelry, costume jewelry and watches is contained in the tables below.

SHIPMENTS

Jewelry

Value of Shipments by All U.S. Producers of
Watches & Precious Metal Jewelry, 1972, 1977
 (Millions of \$)

	Value (Mil.\$)		% Change 1977/1972
	1977	1972	
Jewelry, precious metal, total	\$1,907.7	\$981.8	+ 94.3%
Jewelry made of platinum metals & karat gold	1,251.5	656.7	+ 90.6
Rings, complete	445.8	358.1	+ 24.5
Wedding rings	133.2	109.2	+ 22.0
Other rings	312.6	248.9	+ 25.6
Ring mountings	69.3	68.0	+ 1.9
Women's & children's jewelry such as necklaces, bracelets, brooches, pins, earrings, etc.	327.8	133.1	+146.3
Bracelets for watches	31.4	21.0	+ 49.5
Organizational jewelry	44.7	25.7	+ 73.9
Other, including men's, religious, cigarette cases, lighters, compacts, vanity cases, etc.	52.3	43.4	+ 20.5
Jewelry, not specified by kind	108.0*	7.4	
Jewelry made of gold filled, rolled goldplate & sterling silver	353.0	178.5	+ 97.7
Rings and ring mountings	35.3	39.5	- 10.6
Men's jewelry	33.0	12.7	+159.8
Women's and children's jewelry	184.3	65.2	+182.7
Bracelets for watches	38.1	32.8	+ 16.1
Other jewelry	38.1	21.8	+ 74.8
Jewelry, not specified by kind	24.1*	6.6	
Other jewelry not specified by kind	303.1	146.6	+106.7
Watches, total	772.0	477.5	+ 61.7
Watches with imported movements or modules	300.7	192.1	+ 56.0
Watches with domestic movements or modules, clock cases and parts	471.3	285.4	+ 65.1

*Due to a change in reporting methodology, 1972 data is not directly comparable to 1977 data in this category.

Source: U.S. Bureau of the Census,
 Census of Manufactures, 1977,
Industry Series.

SHIPMENTS

Jewelry

Value of Shipments By All U.S. Producers of Costume Jewelry, 1972, 1977 (Value in millions of dollars)

	No. of Companies With Shipments of \$100,000 or More 1977	Total Value of Shipments (all Producers) 1977 1972		% Change 1977/1972
Costume jewelry, total	na	\$781.5	\$441.7	+ 76.9%
Base metal:	253	567.5	292.1	+ 94.3
Rings & ring mountings	39	43.3	28.8	+ 50.3
Men's jewelry, excl. watch attachments and rings	22	53.1	29.8	+ 78.2
Women's & children's jewelry, costume novelties	160	402.3	151.6	+165.4
Bracelets for watches	5	43.2	{30.5}	- 26.3
Fraternal, college & school jewelry	21		{28.1}	
Other jewelry, including religious	29	25.6	23.3	+ 9.9
Imitation pearls	16	14.3	9.9	+ 44.4
Compact & vanity cases	5	36.2	15.5	+133.5
Other costume jewelry made of plastics, wood, leather, etc.	51	42.0	35.8	+ 17.3
Costume jewelry, not specified by kind	na	121.4	88.4	+ 37.3

na = not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series, MC 77-1-39C.

Gloves

Shipments of leather gloves and mittens (both dress and work) had an estimated value of \$129 million in 1980, according to the 1981 U.S. Industrial Outlook. In 1981, the shipment value is expected to rise 8.5% to \$140 million.

U.S. imports of leather gloves and mittens were an estimated \$68.6 million, 0.9% higher than in 1979, with the Philippines the leading exporting country. U.S. exports reached an estimated \$15.4 million in 1980, 25% above 1979 export levels.

Estimated Value of Shipments By All U.S. Producers of Leather Gloves & Mittens, 1978-1981 (Millions of \$)

	1981 Forecast	1980*	1979*	1978*	% Change	
					1981/ 1980	1981/ 1978
Leather gloves & mittens (SIC 3151**)	\$140	\$129	\$159	\$121	+ 8.5%	+15.7%

*Estimated

**For a definition of this SIC code, see page 4.

SHIPMENTS

Gloves

Information on the quantity and value of shipments of gloves and mittens is covered on a monthly and an annual basis in the Current Industrial Report (CIR) series issued by the Census Bureau. The data contained in the CIR is not exactly comparable to that found in the census of manufactures because shipments from small companies in the industry, whose data had been derived from administrative records in the census, are estimated in the CIR. These establishments accounted for 2% of the total value of shipments in the 1977 census.

Leather dress and semi-dress gloves and mittens increased 44.6% in shipment value but declined 3.3% in quantity between 1972 and 1977, according to the 1977 Census of Manufactures. Fabric dress and semi-dress gloves gained 26.2% in value and declined 24.1% in quantity during the same five-year period.

Dress and semi-dress gloves and mittens increased 9.1% in shipment value in 1979 compared to 1978 while the quantity shipped rose 5.3%, according to the 1979 annual CIR.

Quantity and Value of Shipments By All U.S. Producers of Gloves and Mittens, 1977-1979

	Quantity (Thous. Doz. Pairs)				Value (Million \$)			
	1979	1978	1977	% Change 1979/1978	1979	1978	1977	% Change 1979/1978
Dress & semi-dress gloves & mittens, total	2,719	2,581	2,137	+ 5.3%	\$73.2	\$67.1	\$56.3	+ 9.1%
All knit fabrics, seamless	712	645	628	+10.4	15.1	12.9	9.9	+17.0
All leather	361	409	406	-11.7	27.6	28.1	27.1	- 1.8
Block unit:								
Men's & boys'	107	142	131	-24.6	na	na	na	--
Women's & childrens'	35	39	39	-10.3	na	na	na	--
Other than block cut:								
Men's & boys'	127	143	144	-11.2	na	na	na	--
Women's & childrens'	92	85	92	+ 8.2	na	na	na	--
Leather & fabric combination	290	295	189	- 1.7	14.9	13.3	8.8	+12.0
All woven fabric	(D)	(D)	104	--	(D)	(D)	1.1	
All knit fabric, seamed (cut & sewn)	(D)	(D)	680	--	(D)	(D)	5.7	
Nylon	(D)	(D)	328	--	(D)	(D)	na	
Fabric, excl. nylon	(D)	(D)	352	--	(D)	(D)	na	
Fabric dress & semi-dress gloves & mittens, n.s.k.	112	105	97	+ 6.7	2.3	2.0	1.5	+15.0
Leather dress & semi-dress gloves & mittens, n.s.k.	28	32	33	-12.5	2.2	2.2	2.2	--

na = not available

n.s.k. = not specified by kind.

(D) = withheld by the Census Bureau to avoid disclosing data for individual companies.

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Gloves and Mittens MA-23D(79)-1.

SHIPMENTS

Handbags

Handbag and purse shipments were valued at an estimated \$559 million in 1980 and are expected to increase 9.1% to \$610 million in 1981, according to the 1981 U.S. Industrial Outlook.

The value of 1980 handbag imports were estimated at \$375 million, 25% higher than the 1979 value. The countries of Taiwan, Hong Kong, Korea and Italy account for approximately 83% of the 1979 import value.

Estimated Value of Shipments By All U.S. Producers of Women's Handbags & Purses, 1978-1981 (Millions of \$)

	1981 Forecast	1980*	1979*	1978*	% Change	
					1981/ 1980	1981/ 1978
Women's handbags & purses (SIC 3171**) \$610		\$559	\$518	\$528	+ 9.1%	+15.5%

* Estimated.

** For a definition of this SIC code, see page 4.

The latest detailed information on shipments of women's handbags and purses is from the 1977 Census of Manufactures, as shown below.

Quantity and Value of Shipments By All U.S. Producers of Women's Handbags and Purses, 1972, 1977

	Quantity (Million Units)			Value (Million \$)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Women's handbags and purses, total	na	na	--	\$436.2	\$344.4	+ 26.6%
All leather and chiefly leather	(S)	7.7	--	109.4	67.2	+ 62.8
Plastics or chiefly plastics	25.1*	64.0	- 60.8%	154.6	196.9	- 21.5
Other materials, except precious metals	(S)	4.6	-	53.2	27.9	+ 90.7
Women's and children's handbags and purses, n.s.k.	na	na	--	119.0	52.4	+127.1

na = not available

n.s.k. = not specified by kind

* A portion of this total has been estimated by the Census Bureau.

(S) = Withheld by the Census Bureau because estimate did not meet publication standards.

Source: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Industry Series MC77-1-31B.

SHIPMENTS

Small Personal Leather Goods

Small personal leather goods shipped by U.S. manufacturers in 1980 were valued at an estimated \$493 million, a 12% gain over the 1979 shipment value. According to the U.S. Industrial Outlook, the shipment value is projected to rise 11.4% to \$549 million in 1981.

An approximate 21% increase was felt in the value of small leather goods imported in 1980 (compared to 1979) to reach an estimated \$74 million. Exports increased 14% in value to \$8 million over the same one-year period.

Estimated Value of Shipments By All U.S. Producers of Small Personal Leather Goods, 1978-1981 (Millions of \$)

	1981 Forecast	1980*	1979*	1978*	% Change	
					1981/ 1980	1981/ 1978
Small personal leather goods (SIC 3172**)	\$549	\$493	\$440	\$403	+11.4%	+36.2%

* Estimated.

** For a definition of this SIC code, see page 4.

The value of shipments of personal leather goods rose 59.3% between 1977 and 1972, according to the recently released 1977 Census of Manufactures.

Value of Shipments By All U.S. Producers of Personal Leather Goods, 1972, 1977

	No. of Companies With Shipments of \$100,000 or More	Value of Shipments (Million \$)		
		1977	1972	% Change 1977/1972
Personal leather goods, total	na	\$369.2	\$231.8	+ 59.3%
Billfolds, wallets, French purses & clutches	na	136.0	93.0	+ 46.2
Leather	26	125.3	78.9	+ 58.8
Other than leather (plastic, fiber, etc.)	6	10.7	14.1	- 24.1
Travel kits (fitted and unfitted)	12	21.9	10.5	+108.6
Jewelry boxes and cases	16	47.1	23.3	+102.1
Other personal goods (key, cigarette, eyeglass and vanity cases, cosmetic bags, etc.)	na	97.9	70.5	+ 38.9
Leather	29	55.8	na	--
Other than leather (plastic, fiber, etc.)	29	42.1	na	--
Small leather goods, n.s.k.	na	66.3	34.5	+ 92.2

n.s.k. = not specified by kind.

na = not available.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-31B.

SHIPMENTS

Luggage

Estimated shipment value of luggage increased 4% to \$665 million in 1980 from \$642 million the previous year, according to the 1981 U.S. Industrial Outlook.

Luggage imports rose in value by 4% in 1980 to approximately \$238 million. Taiwan accounted for almost 44% of this value. The value of U.S. luggage exports in 1980 was estimated at \$54 million, up 10% from 1979, with Saudi Arabia accounting for 25% of this value.

Estimated Value of Shipments by All U.S. Producers of Luggage, 1978-1981 (Millions of \$)

	1981 Forecast	1980*	1979*	1978*	% Change	
					1981/ 1980	1981/ 1978
Luggage (SIC 3161**)	\$717	\$665	\$642	\$641	+ 7.8%	+11.9%

* Estimated.

** For a definition of this SIC code, see page 4.

Luggage shipments increased 81.8% in value between 1977 and 1972, according to the 1977 Census of Manufactures. Women's hand luggage rose 15.9% in value despite a drop in quantity shipped of 29.7%.

Quantity and Value of Shipments By All U.S. Producers of Luggage, 1972, 1977

	Quantity (Thous. Units)			Value (Million \$)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Luggage, total	na	na	--	\$585.3	\$321.9	+ 81.8%
Women's hand luggage, all types,						
except zippered	5,123	7,290	- 29.7%	107.2	92.5	+ 15.9
Hard side	(D)	995*	--	(D)	11.6	--
Soft side (lock construction)	1,946	1,855	+ 4.9	35.5	28.7	+ 23.7
Molded (fully or semi-molded)	(D)	4,440	--	(D)	52.2	--
Men's hand luggage, all types,						
except zippered	2,957	2,569	+ 15.1	65.8	45.9	+ 43.3
Hard side	1,398	307*	--	30.1	6.7	--
Soft side (lock construction)		872*	--		15.8	--
Molded (fully or semi-molded)	1,559	1,390*	+ 12.2	35.7	23.4	+ 52.6
Zippered hand luggage, men's & women's	9,917*	7,237	+ 37.0	147.1	55.9	+164.6
Occupational luggage cases, sample cases, etc.	3,570*	2,503*	+ 42.6	32.5	17.5	+ 85.7
Trunks, hand trunks & lockers	1,620*	990*	+ 63.6	19.3	8.5	+127.1
Briefcases, envelopes, school bags	5,395	1,604*	+236.3	27.8	12.4	+124.2
Attache cases	3,876*	2,065	+ 87.7	58.3	22.1	+163.8
Other (musical instrument cases, etc.)	na	na	--	47.6	26.4	+ 80.3
Luggage, n.s.k.	na	na	--	79.7	41.0	+ 94.4

(footnotes continued on next page)

SHIPMENTS

Luggage

Quantity and Value of Shipments By All U.S. Producers of Luggage, 1972, 1977 (continued)

na = not available.

n.s.k. = not specified by kind.

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual companies.

* = A portion of this quantity has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-31B.

Belts

The value of apparel belts shipments increased 4.4% between 1977 and 1972. Men's and boys' belts went up 5.3% in value and 8.4% in quantity during this period. Women's and children's belts rose in value at a slower percentage rate, 2.7%. This information, the latest available, is from the 1977 Census of Manufactures.

Quantity and Value of Shipments By All U.S. Producers of Belts, 1972, 1977

	Quantity (Thous. Units)			Value (Million \$)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Apparel belts, total*	nr	nr	--	\$244.3	\$234.1	+ 4.4%
Women's & children's belts	72,660	nr	--	71.4	69.5	+ 2.7
Made for sale to apparel firms						
Leather	13,488**	(S)	--	22.2	20.2	+ 9.9
Other	40,536	69,048**	-41.3%	22.1	22.0	+ 0.4
Made for sale separately						
Leather	3,816	8,988	-57.5	10.1	14.8	- 31.8
Other	14,820	(S)	--	17.0	12.5	+ 36.0
Men's & boys' belts	74,172	68,436	+ 8.4	132.7	126.0	+ 5.3
Leather	65,592	59,904**	+ 9.5	119.5	115.8	+ 3.2
Other	8,580	8,532	+ 0.6	13.2	10.2	+ 29.4
Leather belts, n.s.k.	1,584	4,296	-63.1	3.7	7.1	- 47.9
Belts other than leather, n.s.k.	7,860	5,628	+39.7	5.9	2.3	+156.5
Belts, n.s.k.	nr	nr	--	30.6	29.2	+ 4.8

* Excludes belts made and sold as part of garments.

** A portion of this quantity has been estimated by the Census Bureau.

nr = not reported

n.s.k. = not specified by kind.

(S) = Withheld because estimate did not meet Census Bureau standards.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23D.

SHIPMENTS

Millinery

Between 1977 and 1972, millinery shipments increased 26.4% in value, according to the 1977 Census of Manufactures. A detailed breakdown of millinery shipments is provided below.

Quantity and Value of Shipments By All U.S. Producers of Millinery, 1972, 1977

	Quantity (Thous. Units)			Value (Million \$)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Millinery, total	na	na	--	\$74.2	\$58.7	+ 26.4%
Fur-felt & wool-felt millinery	2,580*	2,268	+ 13.8%	12.5	7.0	+ 78.6
Fabric millinery, incl. ribbon & pile fabrics	5,952*	5,460	+ 9.0	12.3	11.4	+ 7.9
All other millinery	1,680*	3,144	- 46.6	14.7	13.4	+ 9.7
Millinery, n.s.k.	na	na	--	34.7	26.9	+ 29.0

na = not available

n.s.k. = not specified by kind

* A portion of this total has been estimated by the Census Bureau.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series MC77-1-23C.

Other Accessories

Quantity and Value of Shipments By All U.S. Producers of Specified Accessories, 1972, 1977

	Quantity (Thous. Units)			Value of Shipments (Million \$)		
	1977	1972	% Change 1977/1972	1977	1972	% Change 1977/1972
Cotton handkerchiefs, except embroidered	77,616	186,924	- 58.5%	\$ 27.0	\$28.0	- 3.6%
Umbrellas, parasols & canes	nr	nr	--	36.0	37.8	- 4.8
Sun or glare glasses & sungoggles, ready-made*	nr	34.9	--	130.8	93.9	+ 39.3
Women's, misses' & juniors' scarfs, dickies & other neckwear	22,992	nr	--	29.0	nr	--

nr = not reported

* 1972 quantity in millions

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series:

SHIPMENTS BY STATE

New York State held the largest share of 1977 product shipments in several accessories categories covered by the Census Bureau. The highest share was in the belts, other than leather category, where it was responsible for 64.3% of the total shipment value. Rhode Island led all states in shipment value of jewelry made of precious metal in 1977.

Value of Shipments of Specified Accessories by Leading States, 1972, 1977

	Value of Shipments (Million \$)		% Change 1977/1972
	1977	1972	
Jewelry made of platinum metals and karat gold			
United States, total	\$1,251.5	\$656.7	+ 90.6%
Leading states:			
New York	608.2	338.5	+ 79.7
Massachusetts	105.6	59.5	+ 77.5
Rhode Island	102.1	48.4	+110.9
New Jersey	82.7	51.7	+ 60.0
California	81.9	29.5	+177.6
Texas	63.0	(D)	--
Illinois	31.2	18.9	+ 65.1
Leading states, total	1,074.7	na	
Percent of U.S. total	85.9%	na	
Other jewelry made of precious metals			
United States, total	353.0	178.5	+ 97.8
Leading states:			
Rhode Island	191.0	87.0	+119.5
New York	51.1	28.8	+ 77.4
Massachusetts	33.5	(D)	--
New Mexico	14.8	(D)	--
California	9.5	(D)	--
Leading states, total	299.9	na	
Percent of U.S. total	85.0%	na	
Watches with imported movements or modules			
United States, total	300.7	192.1	+ 56.5
Leading states:			
New York	152.1	133.6	+ 13.8
Percent of U.S. total	50.6%	69.5%	
Watches with domestic movements or modules			
United States, total	471.3	285.4	+ 65.1
Leading states:			
New York	29.5	(D)	--
California	12.1	(D)	--
Pennsylvania	5.6	na	--
Leading states, total	47.2	na	
Percent of U.S. total	10.0%	na	

SHIPMENTS BY STATE

Value of Shipments of Specified Accessories by Leading States, 1972, 1977
(continued)

	Value of Shipments (Million \$)		% Change 1977/1972
	1977	1972	
Leather belts			
United States, total	\$ 155.5	\$ 157.9	- 1.5%
Leading states:			
New York	32.2	71.6	- 55.0
Connecticut	23.3	(D)	--
Texas	21.0	5.5	+281.8
California	10.3	(D)	--
Pennsylvania	8.3	(D)	--
Leading states, total	95.1	na	
Percent of U.S. total	61.2%	na	
Belts, other than leather			
United States, total	\$ 58.2	\$ 46.9	+ 24.1
Leading states:			
New York	37.4	32.8	+ 14.0
Pennsylvania	3.6	na	--
California	3.5	2.2	+ 59.1
Leading states, total	44.5	na	
Percent of U.S. total	76.5%	na	
Fabric dress gloves and mittens (including leather and fabric combination)			
United States, total	26.1	10.6	+146.2
Leading states:			
New York	7.9	4.5	+ 75.6
Percent of U.S. total	30.3%	42.4%	

na = not available

(D) = Withheld by the Census Bureau to avoid disclosing operations of individual companies.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977,
Industry Series.

PRICE TRENDS

Producer Price Indexes for Specified Accessories, 1979, 1980 (1967 = 100 unless otherwise indicated)

	Annual Average		% Change 1980/1979
	1980(p)	1979	
Luggage & small leather goods	172.5	160.1	+ 7.7%
Men's dress gloves, of leather	311.1	272.1	+14.3
Jewelry & jewelry products*	180.8	117.2	+54.3
Jewelry, platinum & karat gold*	218.8	125.9	+73.8
Other precious metal jewelry*	163.1	112.1	+45.5
Costume jewelry*	110.8	103.2	+ 7.4
Watches & clocks	176.3	160.8	+ 9.6

*Dec. 1978 = 100.

(p) = preliminary

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

U.S. imports of jewelry, costume and precious metal, rose 40.4% in value (\$918.6 million) in 1979 compared to 1978. Precious metal jewelry accounted for most of this increase with a 47.1% gain to an import value of \$786.9 million versus the 1978 value of \$535.1 million.

Imported gloves and glove linings of all types rose an overall 24.0% in value, spurred by a 41.6% rise in the value of imported horsehide and cowhide gloves.

Several categories of imported accessories declined in quantity and value in 1979 compared to 1978. Mufflers and scarfs fell 21.2% in value and handkerchief imports experienced the largest declines in both value and quantity. Handbags, watches and watch movements also were among the categories which declined in import value in 1979.

Import statistics for the year 1980 will be available from the Census Bureau in mid-1981. Currently, the most recent import information covers the 1980 period from January to October. The following table compares the quantity and value of accessory imports in this period with the same ten-month period in 1979.

In 1980 so far, the import value of all types of jewelry is 24.8% less than it was in the January to October 1979 period. Gloves and glove linings, another strong import category in 1979, is 15.1% below the 1979 value in 1980. The largest gain in import value over this period is in flat goods.

FOREIGN TRADE

Imports

Summary of U.S. Imports of Specified Accessories, October 1979, 1980
 (Quantity in thousands of units, unless otherwise indicated)

	Quantity			Value* (Mil. \$)		
	Oct. 1980	Oct. 1979	% Change 1980/1979	Oct. 1980	Oct. 1979	% Change 1980/1979
Jewelry & religious articles, total	--	--	--	\$529.5	\$704.1	- 24.8%
Watches & watchcases, total	51,273.6	41,173.0	+ 24.5%	581.7	475.2	+ 22.4
Watch movements, total	6,107.8	6,198.1	- 1.5	60.1	70.0	- 14.1
Watch bracelets, total	2,787.4	2,609.4	+ 6.8	45.4	41.0	+ 10.7
Handbags, reported separately, total	117,704.2	94,873.2	+ 24.1	319.8	265.4	+ 20.5
Handbags & luggage, reported together, total	93.9	143.0	- 34.3	1.8	3.3	- 15.1
Handbags, flat goods & luggage, reported together, total	--	--	--	5.5	5.0	+ 10.0
Luggage, reported separately, total	--	--	--	228.9	216.6	+ 5.7
Flat goods, reported separately, total	--	--	--	69.8	56.6	+ 23.3
Gloves & glove linings, total	--	--	--	158.0	187.9	- 15.9
Mufflers, scarfs & shawls, etc., total	--	--	--	25.7	33.5	- 23.3
Handkerchiefs, total	36,239.9	30,031.7	+ 20.7	11.8	10.9	+ 8.3
Headwear, total	--	--	--	88.3	72.1	+ 22.5
Leather belts, total	--	--	--	24.9	25.1	- 0.8
Sunglasses & sunglasses, valued over \$2.50 per doz. (thous. doz.)	4,572.6	4,959.8	- 7.8	86.8	85.9	+ 1.0
Umbrellas	29,837.4	30,551.5	- 2.3	48.4	48.1	+ 0.6

*The c.i.f. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
 U.S. General Imports, FT 135,
 October 1979, 1980.

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1978, 1979
 (Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. value*		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Jewelry & religious articles, total	--	--	--	\$918.6	\$654.3	+ 40.4%
Nonprecious metal jewelry	--	--	--	100.8	97.7	+ 3.2
Precious metal jewelry	--	--	--	786.9	535.1	+ 47.1
Precious stones and pearls	--	--	--	30.9	21.5	+ 43.7
Watches & watchcases, total	49,437.6	52,614.2	- 6.0%	575.3	594.5	- 3.3
Not over 7 jewels	31,100.5	29,732.4	+ 4.6	394.2	374.0	+ 5.4
8-17 jewels	5,648.4	5,327.0	- 31.5	113.3	152.8	- 25.8
Over 17 jewels	175.5	210.6	- 16.7	39.9	33.5	+ 19.1
Watchcases	14,512.2	17,344.2	- 16.3	27.9	34.2	- 18.4
Watch movements, total	10,337.1	10,615.3	- 2.6	129.1	133.3	- 3.1
Not over 1 jewel	4,775.0	4,330.2	+ 10.3	42.7	40.4	+ 5.7
2-7 jewels	655.8	1,246.9	- 47.4	11.2	13.6	- 17.6
8-15 jewels	25.7	14.0	+ 83.6	0.4	0.4	--
16-17 jewels	1,778.0	1,506.3	+ 18.0	25.9	24.8	+ 4.4
Over 17 jewels	9.4	14.7	- 36.0	1.0	0.6	+ 66.7
Watch bracelets of nonprecious materials, total	3,093.2	3,503.2	- 11.7	47.9	53.5	- 10.5
Handbags (separately reported), total	118,555.4	138,950.3	- 14.7	328.8	245.5	- 4.8
Nonreptile leather	16,858.2	20,553.7	- 18.0	134.1	135.2	- 0.8
Plastic, (other than reinforced or laminated plastic), nspf	46,079.8	44,652.5	+ 3.2	97.3	88.3	+ 10.2
Textile material, nspf	50,937.1	66,754.5	- 23.7	87.6	108.1	- 19.0
Beads, imitation gemstones, etc.	1,509.4	1,886.7	- 20.0	2.4	3.0	- 20.0
Paper yarns	57.6	92.6	- 37.8	0.2	0.3	- 33.3
Materials, nspf	3,113.3	5,010.3	- 37.9	7.2	10.6	- 32.1
Handbags & luggage, of reptile leather, total	161.1	145.4	+ 10.8	4.0	3.2	+ 25.0
Handbags, flat goods & luggage (reported together), total	--	--	--	6.0	5.5	+ 9.1
Reinforced or laminated plastic (thous. pounds)	501.0	451.3	+ 11.0	2.0	1.8	+ 11.1
Textile material, in part braid or handloomed	--	--	--	4.0	3.7	+ 8.1

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1978, 1979
 (Quantity in thousands of units, unless otherwise indicated)
 (continued)

	Quantity			C.I.F. Value*		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Luggage (separately reported), total	--	--	--	\$256.7	\$230.4	+ 11.4%
Nonreptile leather	--	--	--	34.5	28.8	+ 20.0
Textile material, nspf	--	--	--	65.8	50.8	+ 29.5
Materials, nspf	--	--	--	156.4	150.8	+ 3.7
Flat goods (billfolds, key cases, etc.) (separately reported), total	--	--	--	69.8	67.6	+ 3.2
Leather, nspf	--	--	--	32.5	29.3	+ 10.9
Textile materials, nspf	--	--	--	14.6	14.0	+ 4.3
Materials, nspf	--	--	--	22.7	24.3	- 6.6
Gloves & glove linings, total	--	--	--	278.0	224.2	+ 24.0
Gloves, horse or cowhide, total (thous. dozen pairs)	6,538.0	5,324.7	+ 22.8%	109.3	77.2	+ 41.6
All leather	2,224.0	1,766.7	+ 25.9	53.1	40.7	+ 30.5
Not wholly leather	4,314.8	3,558.0	+ 21.3	56.2	36.5	+ 54.0
Gloves, of leather, nspf, total (thous. dozen pairs)	304.0	289.0	+ 5.2	18.0	16.3	+ 10.4
Men's	116.0	102.1	+ 13.6	6.2	5.1	+ 21.6
Lined	79.5	73.8	+ 7.7	4.3	3.7	+ 16.2
Not lined	36.5	28.3	+ 28.9	1.9	1.4	+ 35.7
Women's or children's	188.0	186.9	+ 0.6	11.8	11.2	+ 5.4
Lined	167.3	163.4	+ 2.4	10.7	9.9	+ 8.1
Not lined	20.7	23.5	- 11.9	1.1	1.3	- 15.4
Other gloves & glove linings, total (thous. dozen pairs)	--	--	--	150.7	130.7	+ 15.3
Knit	--	--	--	93.3	76.6	+ 21.8
Cotton	5,187.4	4,151.0	+ 25.0	13.4	9.9	+ 35.3
Textile materials, nspf	187.0	232.1	- 19.4	3.2	2.5	+ 28.0
Man-made fibers	1,069.2	829.6	+ 28.9	4.4	4.2	+ 4.8
Materials, nspf	--	--	--	72.3	60.0	+ 20.5
Not knit	11,157.6	11,293.1	- 1.2	57.4	54.1	+ 6.1
Man-made fibers	3,661.1	4,627.9	- 20.9	33.5	34.6	- 3.2
Other textile materials	7,496.5	6,665.2	+ 12.5	23.9	19.5	+ 22.6

(continued)

FOREIGN TRADE

Imports

U.S. Imports of Specified Accessories, 1978, 1979
 (Quantity in thousands of units, unless otherwise indicated)
 (continued)

	Quantity			C.I.F. Value*		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Mufflers, scarfs & shawls, etc.,						
not knit, total	--	--	--	\$ 39.0	\$ 49.5	- 21.2
Cotton	502.8	1,092.1	- 54.0	0.9	2.2	- 59.1
Vegetable fibers, not cotton	4.5	28.6	- 84.3	0.02	0.1	- 80.0
Wool	2,627.4	4,049.5	- 35.1	7.7	10.5	- 26.7
Silk, not ornamented	3,256.3	3,680.0	- 11.5	14.0	13.6	+ 2.9
Man-made fibers	19,594.5	30,457.8	- 35.7	15.3	22.2	- 31.1
Textile materials (thous pounds)	17.6	22.2	- 20.7	1.1	0.9	+ 22.2
Handkerchiefs, total	36,283.1	45,248.5	- 19.8	13.2	17.9	- 26.3
Cotton	27,891.6	28,244.0	- 1.6	6.8	7.0	- 2.9
Silk	1,772.3	2,363.6	- 25.0	3.0	3.7	- 18.9
Vegetable fibers, not cotton	1,804.7	2,350.0	- 23.2	0.9	1.0	- 10.0
Textile materials	4,814.5	12,190.9	- 60.5	2.5	6.2	- 60.0
Headwear, total	--	--	--	87.1	76.2	+ 14.3
Vegetable material, paper &						
man-made fibers, nspf	--	--	--	25.5	22.4	+ 13.8
Wool, except felt	3,335.0	4,507.0	- 26.0	7.6	8.9	- 14.6
Textile material, except wool,						
nspf	--	--	--	32.8	24.7	+ 32.8
Fur not on the skin, men's & boys'	221.6	383.9	- 42.3	2.4	2.6	- 7.7
Felt & fur not on the skin	--	--	--	1.7	1.2	+ 41.7
Headband & reinforced plastic head-						
wear or hardhats, nspf	--	--	--	17.1	16.4	+ 4.3
Leather belts, total	--	--	--	30.6	26.4	+ 15.9
Sunglasses & sungoggles, valued						
over \$2.50 per doz. (thous. doz.)	5,794.7	5,993.2	- 3.3	102.2	102.2	--
Umbrellas	37,095.4	43,279.1	- 14.3	58.7	58.7	--

nspf = not specially provided for

* The c.i.f. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
 U.S. General Imports, FT 135,
 December 1978, 1979.

FOREIGN TRADE

Exports

U.S. exports of jewelry (both costume and precious metal) rose 8.4% to \$178.8 million in 1979 compared to \$165.0 million in 1978. Exports of jewelry made from semiprecious and precious stones more than doubled in value during this period.

The quantity of leather handbags exported also doubled from 1978 to 1979. Overall, the handbag classification rose 41.6% in quantity, the highest increase among accessory items, and 14.7% in value.

U.S. Exports of Specified Accessories, 1978-1979 (Quantity in thousands of units, unless otherwise indicated)

	Quantity			Value* (Mil. \$)		
	1979	1978	% Change 1979/1978	1979	1978	% Change 1979/1978
Jewelry, total	--	--	--	\$178.8	\$165.0	+ 8.4%
Nonprecious metal jewelry	--	--	--	53.6	46.0	+ 16.5
Platinum or gold jewelry	--	--	--	28.7	66.0	- 56.5
Rolled precious metals or sterling silver jewelry	--	--	--	12.9	14.4	- 10.4
Semiprecious & precious stones & pearls	--	--	--	83.6	38.6	+116.6
Watches, watchcases & watch movements, total	--	--	--	49.7	72.9	- 31.8
Watches	1,428.0	2,543.8	- 43.9%	25.8	30.9	- 16.5
Watchcases, including parts	--	--	--	17.8	24.5	- 27.3
Watch movements	4,009.4	3,185.9	+ 25.8	6.1	17.5	- 65.1
Handbags, total	3,170.3	2,239.5	+ 41.6	10.9	9.5	+ 14.7
Leather	167.5	78.0	+114.7	2.1	2.2	- 4.5
Plastics	2,159.0	1,206.8	+ 78.9	3.6	3.0	+ 20.0
All other materials	843.8	954.7	- 11.6	5.2	4.3	+ 20.9
Flat goods, total	--	--	--	6.7	5.9	+ 36.7
Leather	--	--	--	3.1	1.8	+ 72.2
Non-leather	--	--	--	3.6	3.1	+ 16.1
Luggage, total	--	--	--	46.8	40.6	+ 15.3
Gloves & glove linings, total (thous. dozen pairs)	3,663.5	3,079.5	+ 19.0	26.3	21.4	+ 22.9
Cotton	1,141.8	898.0	+ 27.1	4.4	3.3	+ 33.3
Wool	11.5	12.9	- 10.8	0.2	0.1	+100.0
Man-made fibers	443.5	460.8	- 3.7	2.4	2.4	--
All other textile materials	283.7	205.1	+ 38.3	2.4	2.0	+ 20.0
Leather or fur on the skin	543.2	619.8	- 12.4	12.3	10.8	+ 13.9
Materials, nspf	1,239.8	882.9	+ 40.4	4.6	2.8	+ 64.3

nspf = not specified by kind

* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.

Source: U.S. Bureau of the Census,
U.S. Exports, FT 410,
December 1979, 1978.

FASHION ACCESSORIES

At the Retail Level

THE SIZE OF THE POTENTIAL MARKET

Total Population of the U.S., 1979 & Projections* to 2000 (In Thousands)

	1979	1985	2000	% Change 2000/1979	% of Total Population		
	1979	1985	2000		1979	1985	2000
Total, all ages	220,584	232,880	260,378	+ 18.0%	100.0%	100.0%	100.0%
Under 16 years	54,293	55,273	61,053	+ 12.4	24.6	23.7	23.4
16 years & over	166,291	177,608	199,325	+ 19.9	75.4	76.3	76.6
16-19 years	16,837	14,364	15,679	- 6.9	7.6	6.2	6.0
20-34 years	55,751	60,369	51,348	- 7.9	25.3	25.9	19.7
35-49 years	36,358	42,902	60,334	+ 65.9	16.5	18.4	23.2
50-64 years	32,687	32,668	40,142	+ 22.8	14.8	14.0	15.4
65 years & over	24,658	27,305	31,822	+ 29.0	11.2	11.7	12.2
Median age in years	30.0	31.5	35.5				

Male Population of the U.S., 1979 & Projections* to 2000 (In Thousands)

	1979	1985	2000	% Change 2000/1979	% of Male Population		
	1979	1985	2000		1979	1985	2000
Total, all ages	107,457	113,366	126,558	+ 17.8%	100.0%	100.0%	100.0%
Under 16 years	27,724	28,288	31,296	+ 12.9	25.8	25.0	24.7
16 years & over	79,733	85,078	95,291	+ 19.5	74.2	75.0	75.3
16-19 years	8,548	7,290	7,993	- 6.5	8.0	6.4	6.3
20-34 years	27,837	30,142	25,662	- 7.8	25.9	26.6	20.3
35-49 years	17,749	20,976	29,556	+ 66.5	16.5	18.5	23.3
50-64 years	15,582	15,659	19,364	+ 24.3	14.5	13.8	15.3
65 years & over	10,017	11,013	12,716	+ 26.9	9.3	9.7	10.0
Median age in years	28.8	30.3	34.1				

Female Population of the U.S., 1979 & Projections* to 2000 (In Thousands)

	1979	1985	2000	% Change 2000/1979	% of Female Population		
	1979	1985	2000		1979	1985	2000
Total, all ages	113,128	119,514	133,790	+ 18.3%	100.0%	100.0%	100.0%
Under 16 years	26,569	26,986	29,758	+ 12.0	23.5	22.6	22.2
16 years & over	86,559	92,528	104,032	+ 20.2	76.5	77.4	77.8
16-19 years	8,290	7,074	7,686	- 7.3	7.3	5.9	5.7
20-34 years	27,914	30,226	25,686	- 8.0	24.7	25.3	19.2
35-49 years	18,609	21,926	30,779	+ 65.4	16.4	18.4	23.0
50-64 years	17,105	17,008	20,777	+ 21.5	15.1	14.2	15.3
65 years & over	14,641	16,293	19,103	+ 30.5	12.9	13.6	14.3
Median age in years	31.5	32.7	36.8				

*These are Series II projections, which assume a fertility rate of 2.1, or at the replacement level.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, Nos. 714 (July 1977)
& No. 870 (January 1980).

THE SIZE OF THE POTENTIAL MARKET

Between 1979 and 2000, according to present Census Bureau forecasts, the number of adults in the U.S., aged 35-49 will increase 65.9% as the "baby boom" generation comes of age. Thus, this increase will be felt almost equally among men and women. Overall, it is expected that there will be 19.9% more Americans aged 16 and over by the year 2000.

These forecasts show that many more Americans will be entering their prime earnings years, where their purchasing power will exert a strong influence over many commodities, including apparel. This is good news for accessories manufacturers and retailers as sales can be expected to climb upward due to the rise in disposable income.

THE BRIDAL MARKET

The total number of marriages in the U.S. is expected to increase in 1980, marking the fifth straight year their number has increased. As of November, the 11 month total for 1980 is 1.9% ahead of the similar time period in 1979. The National Center for Health Statistics estimates the 1980 marriage rate at 10.9 per 1,000 population, slightly ahead of 1979.

Total Marriages in the U.S., 1977-1979 & January-November 1980

	<u>Jan.-Nov.</u>		<u>Annual Totals</u>			<u>Rate Per 1,000 Persons</u>		
	<u>1980</u>	<u>1979</u>	<u>1979</u>	<u>1978</u>	<u>1977</u>	<u>1979</u>	<u>1978</u>	<u>1977</u>
Total number of marriages	2,219	2,178	2,317	2,243	2,178	10.5	10.3	10.1

Source: U.S. Department of Health, Education & Welfare, National Center for Health Statistics.

This rise in the number of marriages provides a ready market for many accessories items, most notably jewelry and luggage. An estimated 75% of first time brides receive diamond engagement rings as do 50% of brides being remarried. The average price paid in 1979 was \$585, according to National Family Opinion, a market research firm.

Trade sources indicate the average bride spent approximately \$170 on luggage and accounted for almost 25% of the total women's luggage market.

Recent statistics from the Census Bureau show men and women are marrying at an older age than they once did. In 1979, the median age for a first-time bride was 22.1 years of age; for a man it was 24.4 years. This trend towards delaying marriage until later also has potentially good implications for the accessories market. At the age of first marriage, most persons will have started on their careers and thus have more income to dispose of than previously.

RETAIL SALES

By Type of Accessory

Fashion accessories encompass a variety of products such as jewelry, handbags, hats and scarfs. Although the fashion accessories business constitutes a substantially large market, involving billions of dollars, there are problems in reporting an accurate estimate on the total value of fashion accessories at the retail level. Fashion items are subject to the unpredictability of consumer choice and to the amount of discretionary income the consumer decides to allocate to them.

According to the latest figures from the Department of Commerce, personal consumption expenditure for all clothing and accessories (not including footwear) amounted to \$87.6 billion in 1979. Spending by the nation's consumers for women's/children's and men's/boys' clothing and accessories amounted to \$54.0 and \$28.6 billion, respectively.

Detailed information on men's neckwear, hats and underwear is contained in the Men's Furnishings & Work Wear Fact File. Information on men's and women's hosiery is detailed in the Bodywear, Legwear/Hosiery Fact File.

Jewelry

The Department of Commerce reported 1979 personal consumption expenditures for all types of men's and women's jewelry and watches reached \$9.7 billion, an 8.6% increase over 1978 expenditures.

Personal Consumption Expenditures for Jewelry and Watches, 1977-1979
(Millions of \$)

	<u>1979</u>	<u>1978</u>	<u>1977</u>	<u>% Change</u>	
				<u>1979/ 1978</u>	<u>1979/ 1977</u>
Jewelry & watches, total	\$9,677	\$8,910	\$7,842	+8.6%	+23.4%

Faced with record high gold prices, inflationary/recessionary pressures and credit restraints, consumers turned away from buying fine jewelry in 1980. However, while unit sales in 1980 were down from 1979 levels, dollar sales were expected to show small increases due to the number of persons who bought expensive jewelry as investments. Although gold prices have come down somewhat, 1981 is not expected to register significant increases in either unit or dollar sales.

Rising prices in fine jewelry caused many consumers to "trade-down" to costume jewelry, and 1981 prospects for this segment of the jewelry industry are more promising. Recognizing this trend, jewelry manufacturers are producing more gold-filled pieces, lighter-weight karat gold and hollow chains for sale in 1981.

Colorful jewelry items made of semiprecious stones were among the more popular items in both 1979 and 1980. They are expected to sell well again in 1981 as consumers switch away from gold and toward more colorful fashion accessories to enhance their wardrobe.

RETAIL SALES

By Type of Accessory

Handbags

Although leather prices have remained relatively stable over the past three years, the price of a leather handbag continues to rise to levels out of the reach of many consumers. Average prices for these bags now approach \$70. To combat consumer buying resistance, handbag manufacturers are turning to other fabrications and new colors to lure customers. In 1980, straw, canvas and so-called feather leather (soft vinyl which looks and feels like leather) bags were among the best sellers. Exotic colors such as peach, plum, opal and barley were offered along with different shades of blue to maintain consumer interest. Retail sales of handbags and small leather goods in 1979 were estimated at between \$1.7 billion and \$2.1 billion.

A national survey conducted for the National Handbag Association in 1979 found that 45% of handbags bought in 1978 were not made of leather. Department stores were the most frequent place of purchase. Half of all handbags bought were shoulder bags. (For more complete information on this study, see the Consumer Buying Habits section.)

Belts

Belts have not suffered in the tight economy as much as some accessories have primarily because men have continued to buy belts to update their current wardrobes rather than buy new ones, and they have become an important fashion accessory for women with the growing popularity of skirts and dresses. Innovative use of colors and fabrics such as nylon, wool and cotton in fashion belts have also helped, but leather dress belts are still the mainstay of the industry. Classic European belt stylings utilizing leather and suede with traditional buckle treatments contributed heavily to total sales. Industry estimates are that fashion belts will grow to approximately 25-30% of sales.

Luggage

With more and more Americans taking advantage of their increased amount of leisure time to travel, luggage sales have enjoyed several good years. Current consumer preference is for soft-sided luggage such as totes, carry-ons, garment bags and satchels. In the last six years, designer-name luggage has become a large part of the luggage market, featuring luggage made of vinyl, gabardine, rayon and nylon. Manufacturers are using less leather than before to match the consumer demand for lightweight luggage with an elegant look. Sales of briefcases and attaches are also growing.

Millinery

While it is difficult to place an exact total on the size of the millinery market at retail, 1979 sales were estimated at between \$350-\$400 million. This represents a dramatic turnaround from a decade ago, when the industry was close to extinction. Fortunately for the industry, the fashion pendulum swung back in favor of hats and sales increased. Another big reason for the acceptance of hats is the trend toward western wear. A prime component of the western look is a hat; and cowboy hats made of felt and straw are selling exceptionally well to women, according to the Millinery Institute of America. Evidence of the damage exposed skin can incur from the sun has also sparked interest in wide-brimmed hats among women. Hats are now part of the main floor accessories department rather than their previous restriction to the millinery department only.

RETAIL SALES

By Type of Retail Outlet

The 1977 Census of Retail Trade contains the only official information available on sales of men's and women's accessories in various types of retail outlets with payrolls. Not all store types broke out sales in detail, but the following information reflects sales in major outlet types. Comparative sales figures for prior census years are not available due to changes in the merchandise classification system.

Men's Accessories

Sales of men's accessories reported by leading outlet types amounted to a total of \$1.2 billion in 1977. Department stores accounted for \$704.4 million, or 59.3% of this total.

Reported Sales of Men's Accessories by Store Type, 1977 (Includes only stores with payrolls)

	<u>Stores Reporting Sales</u>		<u>Sales</u>	
	<u>Number*</u>	<u>% of Total</u>	<u>Mil. \$</u>	<u>% of Total</u>
Men's accessories (Hats, gloves, belts, wallets, umbrellas, etc.)	36,426	100.0%	\$1,187.0	100.0%
Department stores**	7,244	19.9	704.4	59.3
Men's wear stores	14,696	40.3	307.4	25.9
Family clothing stores	10,246	28.1	135.9	11.5
Other (women's ready-to-wear stores, men's shoe stores & mail order houses)	4,240	11.6	39.3	3.3

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

** Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Percent of Total Men's and Boys' Wear Sales Accounted For By Men's Accessories Sales in Key Store Types, 1977

	<u>Total Men's & Boys' Wear Sales* (Mil. \$)</u>	<u>% of Total Accounted For By Men's Accessories</u>
Department stores**	\$10,574.9	6.7%
Men's wear stores	6,275.4	4.9
Family clothing stores	3,001.5	4.5

*Excludes men's & boys' footwear sales

**See footnote for the preceding table

Source for both tables:

U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

Women's handbag and small leather goods sales reported by the major outlet types reached \$1.2 billion in 1977. Of this total, department stores accounted for 56.1%, or \$667.9 million.

Department stores were responsible for 73.6% of the \$232.5 million in sales of women's hats, hairpieces and trimmings in the major outlet types during 1977, according to the census reports. In reported sales of other women's accessory items such as gloves, neckwear, belts and umbrellas, department stores accounted for 54.8% of the \$977.5 million volume done by the major store types.

However, it should be noted that these accessories are also sold in other outlet types (variety stores, supermarkets, as well as specialized accessory stores, sporting good stores, etc.) for which sales are not available.

Reported Sales of Specified Women's Accessories by Store Type, 1977 (Includes only stores with payrolls)

	<u>Stores Reporting Sales</u>		<u>Sales</u>	
	<u>Number*</u>	<u>% of Total</u>	<u>Mil. \$</u>	<u>% of Total</u>
Women's handbags & small leather (and plastic) goods	46,765	100.0%	\$1,190.5	100.0%
Department stores**	7,727	16.5	667.9	56.1
Women's ready-to-wear stores***	18,311	39.2	234.3	19.7
Family clothing stores	8,972	19.2	96.2	8.1
Shoe stores	8,450	18.1	126.5	10.6
Mail order houses	3,305	7.1	65.6	5.5
Women's hats, hairpieces & trimmings	12,982	100.0	253.0	100.0
Department stores**	5,557	42.8	171.1	67.6
Women's ready-to-wear stores**	4,524	34.8	40.8	16.1
Millinery stores	256	2.0	20.5	8.1
Family clothing stores	2,299	17.7	14.4	5.7
Mail order houses	346	2.7	6.2	2.5
Women's accessories (gloves, neckwear, belts, umbrellas, etc.)	40,585	100.0	977.5	100.0
Department stores**	7,120	17.5	536.0	54.8
Women's ready-to-wear stores***	20,657	50.9	306.4	31.4
Family clothing stores	8,848	21.8	103.0	10.5
Other stores (men's wear stores, shoe stores & children's wear stores)	938	2.3	12.9	1.1
Mail order houses	3,022	7.5	19.2	2.0

* and ** See footnotes on table of men's accessories sales.

*** Does not include sales in women's accessory and specialty stores (handbag stores, glove stores, etc.) Sales in these stores totaled \$494.5 million in 1977, in 2,937 outlets with payrolls.

RETAIL SALES

By Type of Retail Outlet

Percent of Total Women's and Children's Wear Sales Accounted For By Sales of Specified Accessories in Key Store Types, 1977

	Total Women's & Childrens' Wear Sales* (Mil. \$)	% Accounted For By:		
		Handbags, Small Leather Goods	Hats, Hair- pieces	Accessories (gloves, belts, etc.)
Department stores**	\$ 16,250.7	0.9%	0.2%	0.7%
Women's ready-to-wear stores***	11,066.5	1.9	0.3	2.5
Family clothing stores	3,471.6	1.2	0.2	1.3

* Excludes women's and children's footwear sales.

** See footnote on table of men's accessories sales, page 36.

*** Does not include sales in women's accessory and specialty stores.

Source for both tables: Based on U.S. Bureau of the Census
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Jewelry

Men's and women's jewelry sales in the major store types were reported at \$8.15 billion in 1977, according to the census of retail trade. In this report, jewelry sales include not only both precious metal and costume jewelry, but also watches. As previously noted, not all store types broke out sales in detail; therefore, sales of jewelry in supermarkets and other type stores are not included in the table below.

Reported Sales of Jewelry by Store Type, 1977 (Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. \$	% of Total
Jewelry	110,575	100.0%	\$8,150.8	100.0%
Department stores**	8,355	7.6	1,753.9	21.5
Women's wear stores	9,546	8.6	156.2	1.9
General merchandise stores (except variety & department)	7,107	6.4	675.9	8.3
Jewelry stores & miscellaneous stores	27,828	25.2	4,465.0	54.7
All other store types	53,779	48.6	739.3	9.1
Non-store retailers (mail order houses & direct selling)	3,960	3.6	360.5	4.4

(See footnotes on table of men's accessories sales, page 36.)

RETAIL SALES

By Type of Retail Outlet

Percent of Total Store Sales Accounted for by Jewelry Sales In Key Store Types, 1977

	Total Store Sales (Mil. \$)	% of Total Accounted For By Jewelry
Department stores**	\$76,909.4	2.3%
Women's wear stores	13,163.8	1.1
General merchandise stores (except variety & department stores)	9,597.7	7.0
Jewelry stores	5,010.5	85.6

**See footnote on table of men's accessories sales, page 36.

Source for both tables: U.S. Bureau of the Census,
Census of Retail Trade, 1977,
Merchandise Line Sales RC77-L.

Luggage

According to data released by Samsonite, one of the leading luggage manufacturers in the U.S., national chains accounted for 24.3% of the retail dollar volume spent for luggage in 1979. Department stores had almost 21% of total dollar volume.

Percent of Unit and Dollar Sales of Luggage by Store Type, 1979

	1979	
	% of Units	% of \$
Total	100.0%	100.0%
National chains	23.0	24.3
Discount stores	20.6	20.0
Department stores	18.4	20.9
Luggage stores	6.9	9.8
Mail order	10.7	7.2
Other	20.4	17.8

Source: Stores Magazine
(March 1981).

RETAIL SALES

By Type of Retail Outlet

Merchandising and operating results in three major store types selling accessories are reported below. Data on the total number of stores in 1977 and their total sales of all merchandise in recent years are also shown.

Trends in Total Sales, 1977-1980

	<u>Number</u>	<u>Sales (Mil. \$)</u>
Department stores		
1980(p)	na	\$94,826
1979	na	88,520
1977	8,807	76,909
Women's ready-to-wear stores		
1980(p)	na	15,706
1979	na	14,969
1977	44,894	12,444
Men's wear stores		
1980(p)	na	9,001
1979	na	7,830
1977	22,683	6,943

(p) = preliminary
na = not available

RETAIL OPERATING RATIOS

Department Stores

Accessories Departments in Department Stores, 1979 Selected Typical (Median) 1977 Merchandising & Operating Results in Department Stores with Total Annual Sales Over \$1 Million

	Women's Accessories						
	Fine Jewelry/ Watches (43)#	Costume Jewelry (100)#	Gloves (86)#	Handbags Small Leather Goods (112)#	Men's Access.** (44)#	Misc. Apparel/ Access.* (116)#	Luggage (117)#
Net sales % change from last year	+ 21.6%	+ 5.3%	+ 2.7%	+ 8.0%	+ 6.0%	+ 2.5%	+ 6.1%
Sales % to total store	1.1	1.5	0.5	1.4	1.0	0.7	0.5
Net sales % of merchandise division***	11.7	15.8	4.9	14.4	9.8	7.2	21.5
\$ sales per square foot of selling space	\$360.0	\$209.1	\$171.2	\$147.8	\$226.9	\$112.3	\$ 81.4
Cumulative markon %	48.6%	52.6%	52.0%	51.6%	51.0%	52.4%	48.7%
Gross margin, % of sales	45.0	48.5	50.2	48.1	49.4	48.1	44.1
Markdown, % of sales	5.2	6.3	6.4	8.7	4.0	11.7	7.9
Returns, % of sales	- 9.7	4.5	6.3	8.1	5.1	6.3	7.4
Number of stock turns	2.1	2.9	3.9	3.8	3.1	3.0	2.0
Salespeople's salaries, % of sales	9.2%	9.1%	8.3%	8.9%	6.2%	8.9%	8.4%
Sales promotion, % of sales	3.0	3.1	2.2	2.6	2.7	3.2	4.0

nr = not reported

* Other apparel accessories include neckwear and scarfs, handkerchiefs, umbrellas and belts.
** Men's accessories include ties, handkerchiefs, jewelry and small leather goods, umbrellas, gloves and mufflers.

*** Merchandise division (equal to 100%) for women's accessories is adult female accessories and intimate apparel; for men's accessories it is adult male apparel; for luggage it is hobby and recreation.

Number in parenthesis refers to the number of stores reporting in each category.

Source: National Retail Merchants Association,
"Merchandising and Operating Results,"
1980 Edition.

RETAIL OPERATING RATIOS

Women's Specialty Stores

Women's Accessories Departments in Specialty Stores, 1979 Selected Typical (Median) Merchandising & Operating Results (Specialty Stores with Total Volume over \$1 Million)

	Total Store (52)*	All Jewelry & Watches (26)*	Gloves (15)*	Handbags & Small Leather Goods (23)*	Misc. Apparel Accessories (31)*
Net sales, % change from last year	+ 6.1%	+ 3.0%	+ 3.8%	+ 3.8%	+ 3.0%
Sales, % of total store	100.0	1.6	0.6	1.8	1.3
Net sales, % of mdse. div	--	17.6	5.7	20.9	12.7
\$ sales per square foot of selling space (main or largest selling unit)	\$146.3	\$196.5	\$164.0	\$147.0	\$155.2
Cumulative markon, %	50.5	52.5	51.7	51.1	52.5
Gross margin (incl. cash discounts), % of sales	42.7	44.5	51.7	43.1	46.8
Markdowns (incl. employee discounts), % of sales	19.4	12.6	6.5	15.8	16.7
Number of stock turns	3.1	2.5	3.6	3.9	3.2
Selling salaries, % of sales (Main or largest selling unit)	7.2	nr	nr	nr	nr
Sales promotion costs, % of sales	2.3	2.8	nr	nr	1.6

nr = not reported

* Number in parenthesis refers to the number of reporting firms in each category.

NOTE: Miscellaneous apparel accessories include neckwear, scarfs, handkerchiefs, umbrellas and belts.

Source: National Retail Merchants Association,
"Merchandising and Operating Results,"
1980 Edition.

Men's Wear Stores

Selected Median Merchandising & Operating Experiences in Men's Wear Stores, 1979

	Total Store	Men's Accessories	Men's Belts
% change in sales from last year	+ 3.7%	+ 3.9%	+ 1.4%
% to total store sales	100.0	2.3	1.0
% of total sales within men's furnishings classification	--	13.6	5.8
% distribution of average inventory within men's furnishings classification	100.0	15.4	5.8
Stock turnover (number of times)	1.8	1.7	1.8

Source: Menswear Retailers of America,
1979 Annual Business Survey.

RETAIL PROMOTIONS

Seasonality in Newspaper Advertising Linage of Women's Accessories & Luggage Percent of Year's Total Linage Used Each Month (Five-year Average, 1971-1975)

	Costume Jewelry	Gloves	Handbags	Hats & Trimmings	Luggage
Total lineage	100.0%	100.0%	100.0%	100.0%	100.0%
January	4.5	7.7	4.6	7.0	4.8
February	6.7	4.7	5.9	5.9	7.1
March	7.7	5.9	9.9	11.4	5.4
April	8.0	5.4	9.5	7.7	6.5
May	9.3	3.5	10.5	4.8	11.9
June	4.8	1.1	5.8	3.8	12.1
July	5.0	1.1	5.3	2.3	6.7
August	7.6	1.9	8.6	5.8	11.3
September	8.5	5.7	9.2	8.4	5.1
October	9.3	16.4	8.9	11.9	5.8
November	12.2	23.0	10.3	15.1	9.9
December	16.4	23.6	11.5	15.9	13.4

Source: The Advertising Checking Bureau, Inc.—
Neustadt Reports Div., covering retail
newspaper advertising lineage in all
newspapers in seven cities: Chicago,
Philadelphia, Cincinnati, Dallas,
Cleveland, Los Angeles and Washington.

CONSUMER BUYING HABITS

Men's Accessories

A men's accessories survey conducted by DNR Infact (July 16, 1980) among 85 department and men's specialty store accessory buyers found that only 14% thought their accessories sales had decreased in 1979 as a percentage of total men's department sales. The percentage contribution of accessories increased according to 47% of the survey, while 39% thought it had remained the same.

When asked which accessory item had shown the most growth over the past year, over half mentioned jewelry.

"Which Accessory Item Has Shown the Most Growth Over the Past Year?"

	% of Total
Total respondents	100%
Jewelry	52
Belts	12
Small leather goods	11
Headwear	1
All other accessories*	24

*Includes ties, fragrances and grooming aids, hosiery, underwear, gloves, sunglasses and novelties.

CONSUMER BUYING HABITS

Teenage Market for Accessories

In September 1980, the annual Seventeen Magazine Back-To-School Study was conducted with responses from 2,533 teenage girls concerning their purchases of apparel and accessories during this period. Questionnaires were mailed to high school and college females on Seventeen's Consumer Panels, which represent a cross section of the total teenage girl market. The results were projected to the entire teenage female market (9,176,000 girls) in terms of percent of the market purchasing specified accessories, the number of items purchased and the total expenditure for each item.

Projected to this nationwide market, the survey concluded that almost 7.8 million girls, or 84.9% of teenage girls, bought at least one of the accessories mentioned in the following table for back-to-school. Of the projected \$6.8 billion spent on their back-to-school wardrobe, teenage females spent \$585.2 million for accessories, 8.6% of the total.

Purchases of Accessories By Teenage Girls

	Percent Purchasing % of All Girls*	% Purchasing Any Accessory*	Number Purchased (Thous. Units)	Total Expenditures (Thous. \$)
Total	100.0%	100.0%	42,693	\$ 585,182
Jewelry				
Earrings	33.0	38.8	8,932	78,062
Bracelets	12.2	14.4	3,096	30,377
Pins	18.0	21.3	3,686	24,266
Necklaces	23.0	27.1	4,064	95,127
Rings	15.5	18.2	2,146	123,799
Handbags	55.2	65.0	6,568	110,121
Belts	44.5	52.4	7,501	50,131
Scarfs				
Warm (outdoor)	5.0	5.9	593	5,502
Lightweight (indoor)	1.8	2.1	276	2,619
Wallets/billfolds/key cases	19.0	22.3	2,149	21,006
Sunglasses	12.5	14.7	1,234	16,434
Hats	9.6	11.3	1,115	15,530
Gloves				
Knit	8.8	10.4	1,000	6,857
Leather	3.3	3.9	333	5,351

* The numerical base for "Percent of All Girls" column is 9,176,000; for "Percent Purchasing Any Accessory" column, it is 7,789,000 girls.

Women's Handbags

A June 1979 survey conducted among a nationally-representative sample of women for the National Handbag Association analyzed their handbag purchases made in a 12-month period prior to the survey. Significant findings in the study are discussed below.

(continued)

CONSUMER BUYING HABITS

Women's Handbags (continued)

Of the 40,186 respondents, 37% own nine or more handbags. The average number of handbags owned fell between eight and nine, with an average of close to two handbags bought in the 12 months preceding the study. Handbags made of leather accounted for 43.8% of bags purchased during this period. Vinyl handbags were the next most popular material with canvas a close third. Over half of the bags purchased were shoulder bags, with tote bags accounting for an additional 20.3% of total unit purchases.

Respondents were also asked to rank the importance of several factors in their handbag selection. Color and style were the two most frequently named factors in this decision.

Most Important Factor in Handbag Selection

	<u>% of Mentions</u>
Color	21.9%
Size	11.8
Style	18.2
Material	4.8
Quality	14.5
Brand name	0.7
Price	8.1
Functionalism	15.7
Type of closure	4.7
Total	100.0*

* Total adds to more than 100% due to multiple responses.

The National Handbag Association survey also broke out some demographic characteristics of women who bought handbags in the year prior to the study.

Demographic Characteristics of Handbag Purchasers

	<u>Total</u>	<u>No. of Handbags Purchased</u>		
		<u>1</u>	<u>2-3</u>	<u>4 or more</u>
Total respondents	100.0%	100.0%	100.0%	100.0%
<u>Age of Respondent</u>				
18-24 years	17.5	16.3	17.1	25.2
25-34 years	21.8	23.8	19.6	24.3
35-44 years	16.2	16.6	16.6	12.1
45-54 years	15.0	12.8	16.9	15.3
55-64 years	13.4	13.5	13.4	13.6
65 years or over	16.0	17.1	16.3	9.4

(continued)

CONSUMER BUYING HABITS

Women's Handbags

Demographic Characteristics of Handbag Purchasers (continued)

	Total	No. of Handbags Purchased		
		1	2-3	4 or more
<u>Annual Household Income</u>				
Under \$15,000	29.1	31.5	27.5	27.0
\$15,000-19,999	13.2	13.9	12.3	14.3
\$20,000-24,999	12.1	9.5	15.2	7.8
\$25,000-29,999	8.5	10.2	7.3	7.6
\$30,000-39,999	7.1	6.5	7.0	12.0
\$40,000-49,999	2.7	1.2	4.3	1.0
\$50,000 and over	3.1	2.6	2.2	10.6
Don't know/no answer	24.1	24.8	24.2	19.8
<u>Employment Status of Respondent</u>				
Employed full-time	29.7	27.2	30.7	36.0
Employed part-time	16.7	18.7	15.4	14.5
Not employed	52.5	53.2	52.5	48.9
No answer	1.1	0.9	1.3	0.7

Source: The National Handbag Association
Consumer Study, Sept. 1979.

Jewelry and Watches

The 1980 Survey of Adults and Markets of Affluence, conducted in April and May of 1980 by Monroe Mendelsohn Research, Inc., presented the results of their study among a representative sample of U.S. adults with household incomes of \$40,000 or more. Completed interviews were obtained from 3,219 affluent adults and projected to the estimated 1980 affluent population of 15.8 million, 10% of the total adult population, and the estimated 5.71 million affluent households, 7% of total U.S. households.

The study projected that jewelry was purchased in the year prior to the survey by 70.4% of all affluent adults and watches were purchased by 44.1%. Their average expenditure during this period amounted to \$461 for jewelry and \$242 for watches. Projected total expenditures for all affluent households was \$1.85 billion for jewelry and \$610 million for watches.

Other Accessories

A study conducted in April and May of 1980 by Monroe Mendelsohn Research, Inc. provided information on ownership by college students of a wide variety of products, including certain accessory items. The survey was done among a sample of college students, with 3,909 completed interviews. The results are projectionable, according to the source, to the total college population of almost 4.4 million full-time students in 1980. The age of the sample was from 18-23 years of age.

(continued)

CONSUMER BUYING HABITS

Other Accessories (continued)

Men's belts were owned by 91.0% of the college students. Belt ownership was highest among third and fourth year students (92.5% and 92.4%, respectively). Only 88.7% of first year students owned belts. Slightly more students (91.3%) said they owned wallets or billfolds, with first year students again having the smallest percentage of owners (90.5%).

Among female students, 85.1% own belts and 88.2% own wallets or billfolds. Third year students (86.0%) and fourth year students (86.3%) were more likely to own belts than either first (84.1%) or second (84.7%) year students. In ownership of wallets or billfolds, second year students were behind only fourth year students in ownership.

Female collegians were more likely to own either an overnight bag or full-size luggage than their male counterparts (67.5%-46.8% and 68.1%-45.9%, respectively). For both types of luggage, fourth year students had the highest percentage of ownership with first year students the lowest.

The following information on men's and women's accessories has been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc., Floral Park, N.Y. They are based on the findings from an on-going monthly panel diary tracking the purchases of 6,500 nationally representative families. (Note that "singles" - with their own households - are not included. The data includes purchases made for men and women 17 years of age and over.)

Men's Accessories

Gloves

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	13.7	21.6
National chains	13.7	17.1
Discount stores, incl. K mart	37.2	28.5
Specialty stores	3.7	6.5
Mail order	0.6	3.3
All other outlets	30.0	22.4
Not reported	1.1	0.6

Percent of Purchases by Price Point, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$2.00	50.9	15.3
\$2 - 4.99	25.6	22.8
\$5 - 10.99	17.5	36.3
\$11 and over	5.9	25.4

Source for both tables: NPD Research, Inc.

CONSUMER BUYING HABITS

Belts

In 1980, the average price paid for a belt by the members of the NPD panel was \$7.61.

Percent of Purchase by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	25.8	29.4
National chains	17.0	18.9
Discount stores, incl. K mart	22.7	15.4
Specialty stores	20.4	24.5
Mail order	3.6	2.7
All other outlets	9.9	8.7
Not reported	0.6	0.5

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$5.00	26.3	11.5
\$5 - 8.99	38.7	34.9
\$9 - 12.99	26.8	36.8
\$13 & over	8.3	16.7

Source for both tables: NPD Research, Inc.

Headwear

According to the NPD panel data, specialty stores accounted for 29% of dollars spent for headwear, although they sold only 10% of headwear units in 1980.

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	18.2	23.1
National chains	12.2	10.5
Discount stores, incl. K mart	33.3	17.1
Specialty stores	10.0	29.0
Mail order	2.3	2.1
All other outlets	21.3	16.2
Not reported	2.7	2.0

The average price paid for a man's hat in 1980 was \$9.90; for a cap, it was \$3.69, according to NPD panel data.

(continued)

CONSUMER BUYING HABITS

Men's Accessories—Headwear (continued)

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases of headwear	100.0%	100.0%
Less than \$2.00	25.6	4.7
\$2-4.99	38.7	18.1
\$5-10.99	19.7	21.8
\$11-24.99	11.7	27.4
\$25 & over	4.5	28.1

Source for both tables: NPD Research, Inc.

Wallets

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	32.0	33.3
National chains	15.2	16.4
Discount stores, incl. K mart	21.1	19.6
Specialty stores	5.8	8.5
Mail order	1.5	1.1
All other outlets	24.4	21.0

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$5.00	9.4	3.0
\$5-8.99	34.2	24.0
\$9-14.99	33.9	38.6
\$15 & over	22.5	34.4

Source for both tables: NPD Research, Inc.

CONSUMER BUYING HABITS

Women's Accessories—Gloves

The average price paid for women's gloves and mittens by the NPD panel members in 1980 was \$5.41.

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	28.4	41.0
National chains	15.4	11.7
Discount stores, incl. K mart	31.4	16.5
Specialty stores	8.2	18.8
Mail order	0.2	0.4
All other outlets	15.4	10.5
Not reported	0.9	1.0

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$2.00	31.1	7.5
\$2-4.99	36.7	22.2
\$5-10.99	18.5	24.7
\$11 & over	13.7	45.6

Source for both tables: NPD Research, Inc.

Handbags

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	30.3	41.3
National chains	12.5	9.8
Discount stores, incl. K mart	26.0	13.6
Specialty stores	14.2	17.7
Mail order	1.8	2.7
All other outlets	14.5	14.2
Not reported	0.7	0.7

(continued)

CONSUMER BUYING HABITS

Women's Accessories — Handbags (continued)

The average handbag sold for \$12.47 in 1980, according to NPD panel diary information.

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$7.00	41.9	16.0
\$7-14.99	32.3	26.7
\$15-24.99	15.8	24.4
\$25 & over	10.0	32.9

Source for both tables: NPD Research, Inc.

Belts

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	29.8	34.2
National chains	7.7	7.7
Discount stores, incl. K mart	22.2	12.0
Specialty stores	30.1	36.2
Mail order	1.3	0.6
All other outlets	6.1	6.3
Not reported	2.8	3.0

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$2.00	29.3	8.9
\$2-4.99	39.1	31.4
\$5-8.99	22.9	33.9
\$9 & over	8.8	25.9

Source for both tables: NPD Research, Inc.

Hats

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	27.8	38.7
National chains	10.9	9.2
Discount stores, incl. K mart	31.1	17.3
Specialty stores	10.7	21.2
Mail order	1.4	1.5
All other outlets	17.6	11.5
Not reported	0.4	0.5

(continued)

CONSUMER BUYING HABITS

Women's Accessories — Hats (continued)

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$2.00	29.9	7.2
\$2-4.99	39.3	25.1
\$5-10.99	20.7	29.4
\$11 & over	10.2	38.4

Source for both tables: NPD Research, Inc.

Wallets

Percent of Purchases by Store Type, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Department stores	34.7	42.5
National chains	22.3	21.8
Discount stores, incl. K mart	14.0	11.0
Specialty stores	6.0	5.8
All other outlets	19.8	16.8
Not reported	3.2	2.2

Percent of Purchases by Price Points, 1980

	<u>% of Units</u>	<u>% of Dollars</u>
Total purchases	100.0%	100.0%
Less than \$5.00	31.6	10.2
\$5-10.99	30.3	25.2
\$11-19.99	30.6	45.2
\$20 & over	7.5	19.4

Source for both tables: NPD Research, Inc.

FAIRCHILD FACT FILES AVAILABLE FOR 1981

CONSUMER MARKET DEVELOPMENTS (1980 Edition available now—1981 Edition will be available in December, 1981): Provides a detailed view of consumers in the U.S., including population by age and income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and retail sales by store types.

THE CUSTOMER SPEAKS—1980: Supplementing the comprehensive reports on fall/winter and spring/summer wardrobes (published in THE CUSTOMER SPEAKS, 1979 FACT FILE), this report covers details on buying practices in relation to specific types of women's wear, as well as information on reactions to price increases, attitudes toward stores and sales help, views regarding quality levels in specific types of apparel and more. Findings are based on a nationwide survey among a representative sample of women and are presented in terms of significant demographic characteristics. (\$15.00)

THE CUSTOMER SPEAKS (A FACT FILE SPECIAL EDITION): Complete findings of two nationwide surveys conducted for Women's Wear Daily among a cross-section of women on their fall/winter and spring/summer wardrobes, their new apparel acquisitions, and buying plans for next season. Also includes information on buying habits, place of purchase, activities, attitudes, and outlook. Data is analyzed in terms of demographic characteristics, employment status, fashion stance, and degree of social activity. (204 pages, \$20.00)

DEPARTMENT STORE SALES (1980 Edition available now—1981 Edition will be available in January, 1982): Covers sales of department stores and the number of stores operated, listed by geographic region and state, based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of \$50 million or more, are included.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S) (1980 Edition available now—1981 Edition will be available in July, 1981): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments as well as imports. Provides retail sales and merchandising statistics and a comprehensive consumer survey conducted by Footwear News Magazine.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer buying patterns are also covered.

HOUSEHOLD FURNITURE AND BEDDING: Provides industry-wide data on manufacturers' shipments of furniture and bedding (mattresses and bedsprings) and number, size and location of manufacturing firms as well as sales of leading manufacturers. Retail information includes sales in furniture and department stores, popular furniture styles and materials, and on consumer buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR (May): Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES (November): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more.

MARKET PACESETTERS (YOUNG ADULTS) (May): Spotlights statistical information on young adults (25 to 44 years of age)—the segment of the population which will show the greatest growth in numbers in the next few years. Marketers have an important need to know about these young adults who account for the bulk of new household formations and a significant share of retail sales. Facts on their incomes, living arrangements, family size, mobility, etc., are included in the FACT FILE. (Special, New Fact File for 1981, \$15.00)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR, JEANS AND ACTIVE WEAR: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels and fashion jeans, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (August): Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits.

MEN'S, WOMEN'S AND CHILDREN'S BODYWEAR AND LEGWEAR/HOSIERY: A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

SOFT SURFACE FLOOR COVERINGS: Trends in the number of manufacturers in production and value of shipments of major types of soft surface floor coverings are covered in this report. Also included are developments in fiber consumption. Retailing information includes departmental operations, estimated volume by type of outlet and trends in consumer buying.

THE TEXTILE/APPAREL INDUSTRIES (October): Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery.

TOILETRIES, BEAUTY AIDS, COSMETICS AND FRAGRANCES: A detailed view of the industry covering production for both the female and male market. Includes latest available industry statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures data, buying habits and usage of various product types are also highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

WOMEN'S COATS, SUITS, RAINWEAR AND FURS (June): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans.

WOMEN'S DRESSES: Statistics on the women's dress industry, including unit-price and dozen-price dresses, trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

WOMEN'S INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (September): Data on production and shipments tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

WOMEN'S SPORTSWEAR, SEPARATES, JEANS AND ACTIVE WEAR: A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer label.

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